OrgPublisher 11.8 User Guide

OrgPublisher™

Overview

The following information provides a road map for the OrgPublisher activities and tasks to create organization charts. For more detailed information about features in this guide, please refer to the OrgPublisher application Help file by clicking **Help** in the OrgPublisher Main menu, then **User manual** from the options list.

Section type	Tasks
New with this Version	Prebuilt reports, publish to iPad, bulk field editor
Before You Begin	Information about licensing system requirements, primary user roles
Prepare Chart Data	Data must conform to the Input File Layout or the Universal File Layout
Create Charts	Administrator creates charts that can include prebuilt reports, custom styles, hotspots, and more
Custom Fields	Custom fields containing HR/ERP data, email addresses, telephone numbers, office numbers, sales figures, etc.
Position Types	Position types help create your organizational hierarchy; use standard or create your own
Prebuilt Reports	Provide preformatted business focus on select aspects of organization, using the Universal File Layout (UFL)
Format Charts	Enhance appearance and display specific data using custom fields, icons, photos, logos, legends, etc.
Summaries and Formulas	Add summaries, head counts, use formulas to mine data
Preview and Modify	Review and modify chart layout before printing
Print Charts and Views	Add headers or footers, print in wall style or book style
Publish Charts	Publish to the web, intranet, OrgPublisher Executive on iPad, enable interactive, planning, and security features
Modify Charts	Edit charts working with custom fields, groups, position types, pinned profiles, and more
Archive Charts	Save snapshot of organization and archive for future reference
Work with Published Charts	End users can search charts, create groups, send to PowerPoint or Excel, and more
Work with Cross Browser Published Charts	Cross browser charts can be viewed using several different Web browsers
Cross Browser Planning Charts	Cross browser planning charts can be viewed and modified using several different Web browsers
Web Administration	Runs as an ActiveX control that access files and data on a web server, and works much like standard OrgPublisher
Troubleshooting	Review samples of warning, error messages, and problem solving
Resources	Links to additional support, such as tutorial video, Customer Support Portal, and more

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New with this Version

With this version of OrgPublisher, new features include:

New Features	OrgPublisher Premier	OrgPublisher Standard	Published Chart
New in 11.8			
Enhanced matrix reporting view	X		Viewed only
Enhanced graphs view	X	X	Planning chart
New in v11.7			
OrgPublisher Executive for iPad Enhancements			X (Executive only)
Enhanced security for Silverlight/cross browser planning charts			X
Sortable columns in the application Errors Found in Data dialog	X	X	
Advanced Box Layout 11.6			
Now supports multiple-selection of fields and labels	X	X	n/a
Publishing Wizard 11.6			
Dialogs modified for cross browser/ Silverlight redesign changes	X		
Cross Browser/Silverlight Enhancements 11.6			
Redesigned toolbars			X
Planning Profile redesign			X
Additional Planning actions available			X
Redesigned Search results			X
General			
Prebuilt Report templates	X	X	X
Update Person dialog enhancements	X	X	OrgPlan only
Publishing			
Publish to OrgPublisher Executive on Apple® iPad®	x		Employee data on iPad device
Publishing Wizard enhancement – new iPad performance dialog	X		n/a
Custom fields			
Custom field bulk editor	X	X	n/a
Formula indicator in Sample column (f)	X	X	n/a

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Views			
Profile View bulk editor	X	X	n/a
Wizard enhancements			
New Chart Wizard for Prebuilt Reports	X	X	n/a
Publishing Wizard for publishing to OrgPublisher Executive on iPad	X	X	n/a
Cross Browser/Silverlight 11.5			
Chart Legend available in cross browser/Silverlight charts			X
Planning charts published to cross-browser			X

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Prebuilt Reports

OrgPublisher Premier provides prebuilt report templates for human resource areas of responsibilities. Areas you can isolate into a single report include, directory listing, head count, open positions, contractors, span of control, succession planning, and more.

Using the Universal File Layout (UFL) and the New Chart Wizard, you can quickly create a chart with your selected area of interest. The UFL template takes care of arranging, formatting, and calculating your data into a prebuilt report (chart) and style.

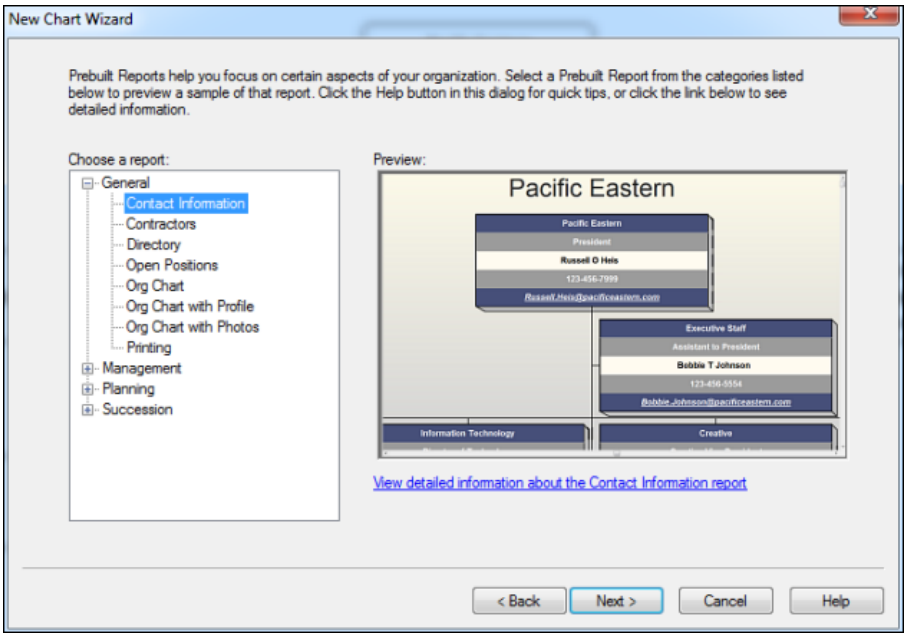

New Chart Wizard
Prebuilt Reports help you focus on certain aspects of your organization. Select a Prebuilt Report from the categories listed below to preview a sample of that report. Click the Help button in this dialog for quick tips, or click the link below to see detailed information.
Choose a report:
General
Contact Information
Contractors
Directory
Open Positions
Org Chart
Org Chart with Profile
Org Chart with Photos
Printing
Management
Planning
Succession
Preview:
Pacific Eastern
View detailed information about the Contact Information report
< Back
Next >
Cancel
Help

Figure 1.

There are four categories of reports:

General - These charts cover the basics such as: a standard org chart, directory listing of employees, org charts featuring open positions, contractors profile views, photos and a layout specifically for printing.

Management - Management related activities include: Head Count, Head Count with Open Positions. Direct Report Analysis, and Span of Control Analysis.

Planning - Planning focused charts include charts related to Head Count, FTE, Contractors, Salary and Head Count, Salary, Head Count, and Performance, and Talent Review.

Succession - Includes Succession Planning focused charts including Ratings and Ratings with Photos.

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Prebuilt Reports - General Sample

The Contact Information Report provides basic contact information for each employee appearing in the chart. See the OrgPublisher Using Prebuilt Reports document for more details on this and other report options.

Category:	**General**
Report:	**Contact Information**
Description:	**Display a high level chart of an organization's reporting structure with basic employee information in each box. Designed to meet the needs of a broader audience, this view allows employees to see who reports to whom and basic contact information for each person or position in the organization.**

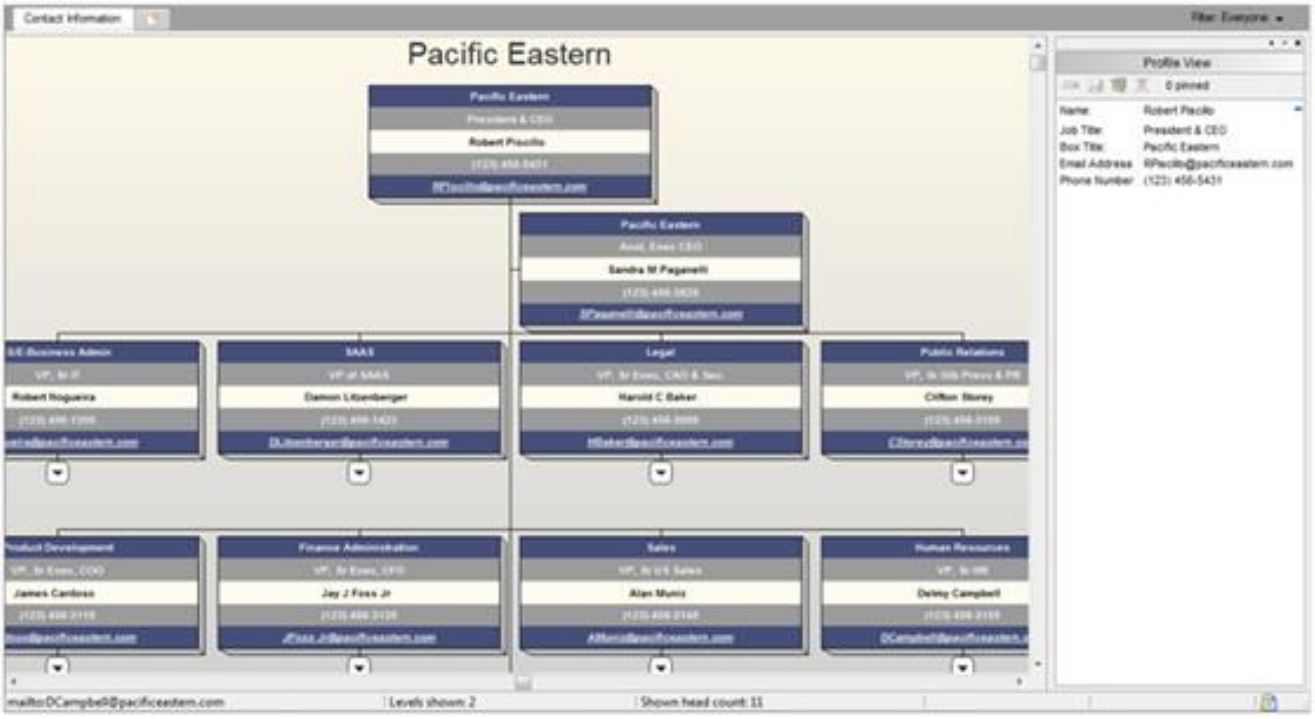


Figure 2.

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Prebuilt Reports - Management Samples

The Head Count Report provides direct and overall head count information for each manager appearing in the chart. See the OrgPublisher Using Prebuilt Reports document for more details on this and other report options.

Category:	**Management**
Report:	**Head Count**
Description:	**Drill up and down within the org chart to see an organization's current headcount and direct reports. Summary data in this view reflect the counts relevant to each manager's span of control. Use the Search View to quickly access information about an individual or group or Profile View to provide comprehensive information regarding each chart record.**

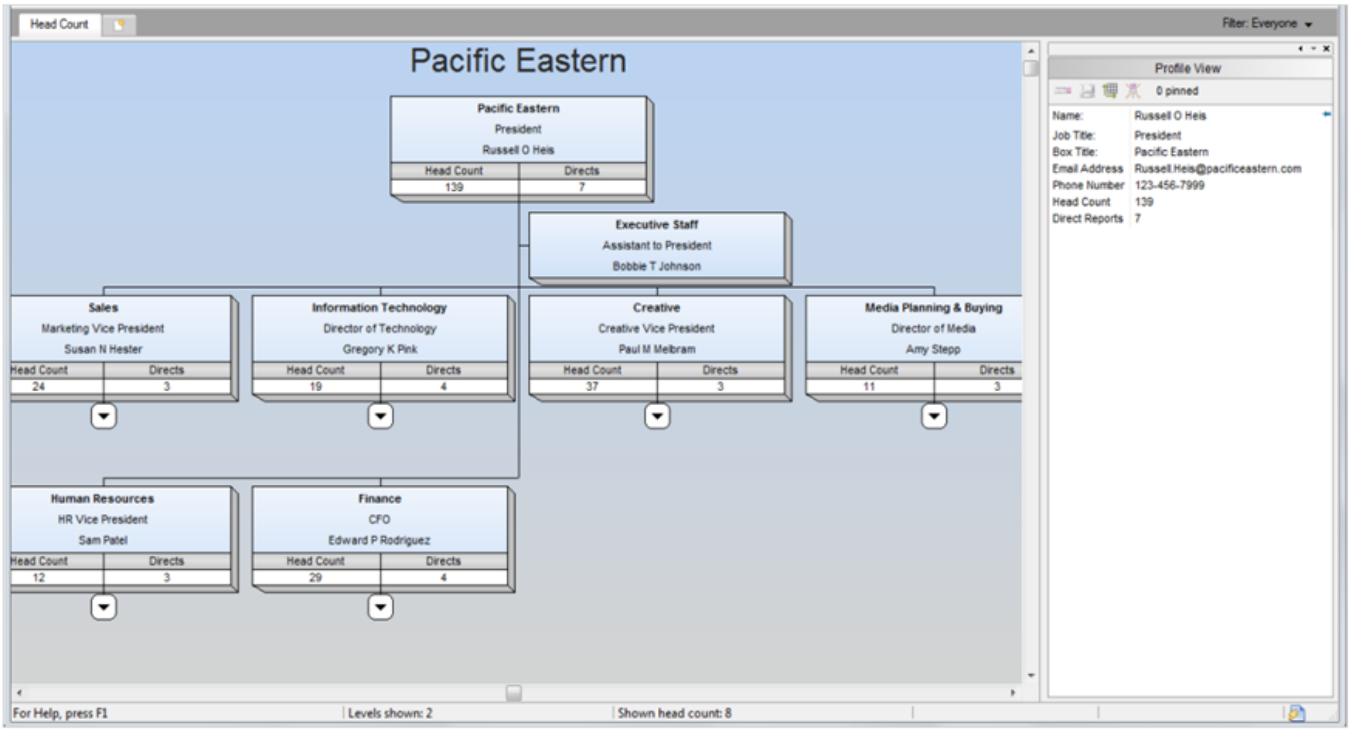


Figure 3.

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Prebuilt Reports – Planning Samples

The Salary and Head Count Report provides individual and total salary, in conjunction with total head count, information for each manager appearing in the chart. See the OrgPublisher Using Prebuilt Reports document for more details on this and other report options.

Category:	**Planning**
Report:	**Salary and Head Count**
Description:	**Drill up and down within the org chart to see an organization's current headcount and corresponding workforce cost (salary). Summary data in this view reflect the counts relevant to each manager's span of control. Actively plan and run "What-If?" scenarios for changing structure of one or more departments and display resulting tally of total head count and workforce cost for budgeting purposes.**

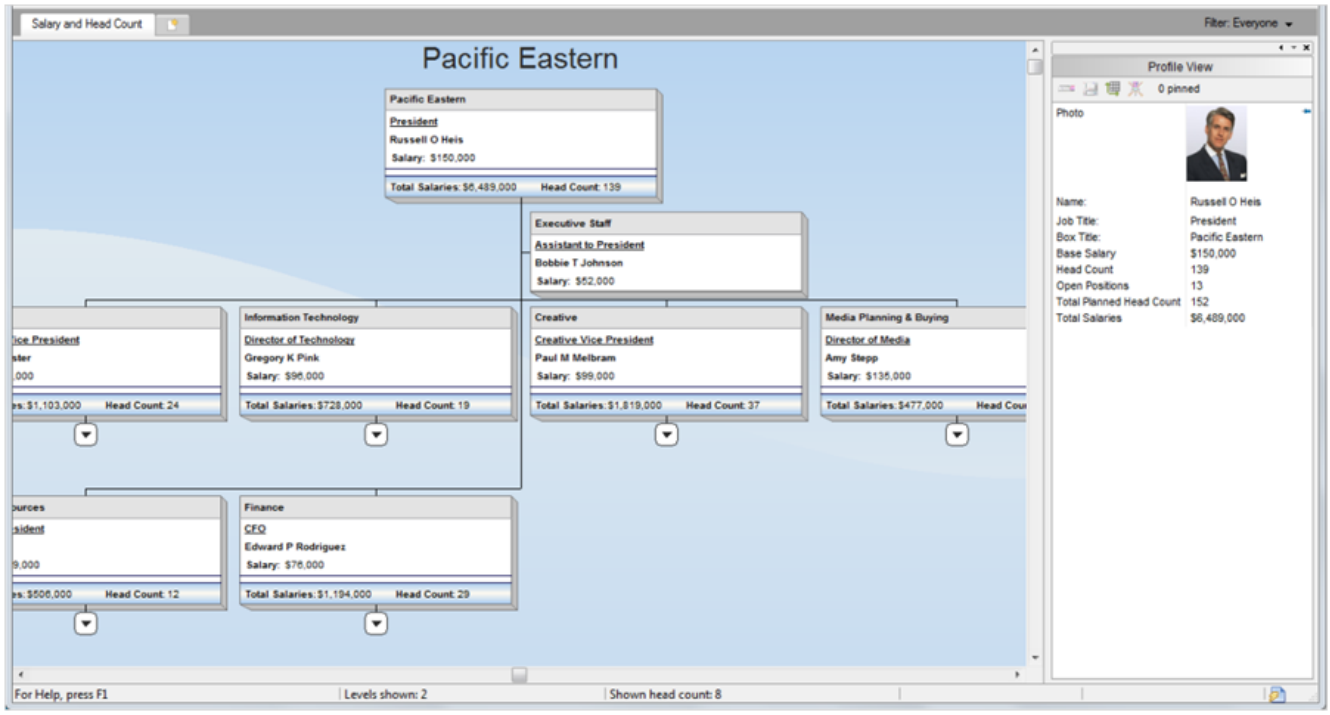


Figure 4.

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Prebuilt Reports – Successions Samples

The Succession Ratings Report provides performance, potential, risk, and impact information for each succession candidate appearing in the chart. See the OrgPublisher Using Prebuilt Reports document for more details on this and other report options.

Category:	**Succession**
Report:	**Succession Ratings**
Description:	**Visualize all employees with easy-to-follow, color-coded status indicators that rate the performance, potential, risk and loss impact of each employee and their successor candidate. Drill up and down within the org chart to evaluate the organization's talent. Quickly identify high loss impact individuals to help put in retention plans. Identify high performers and identify those employees with lower ratings that may benefit from a develop program.**

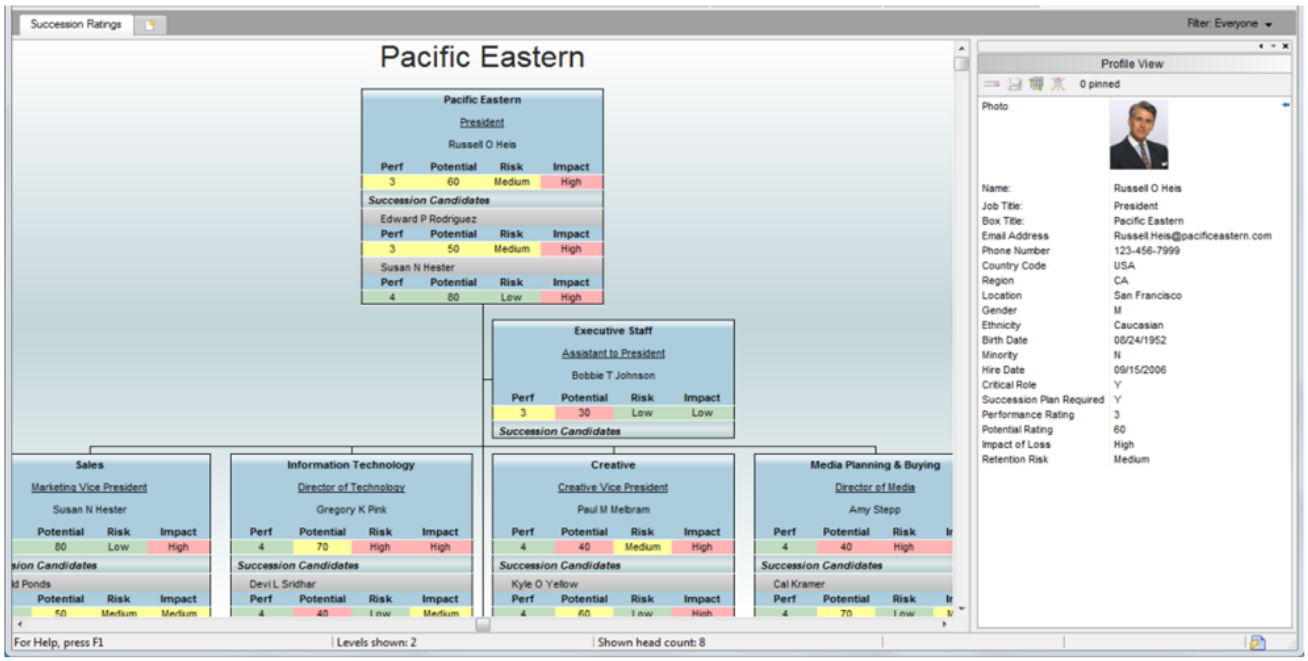


Figure 5.

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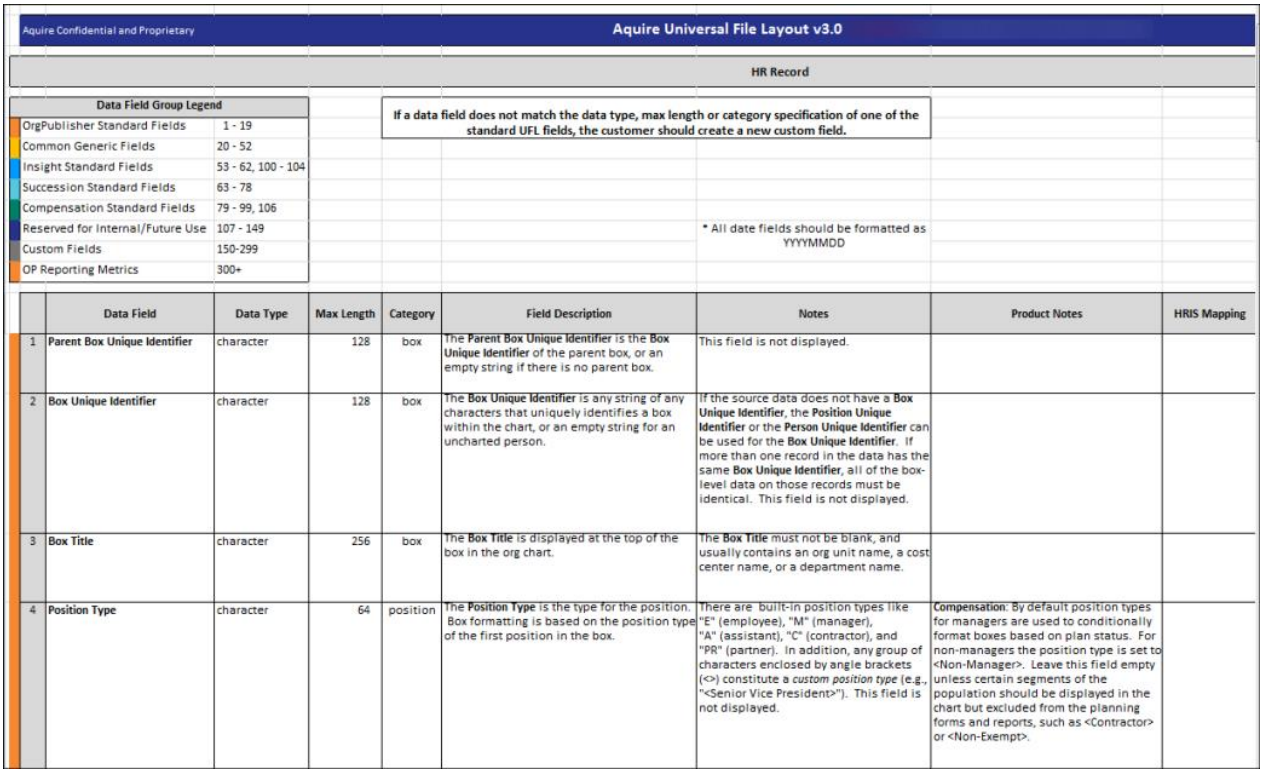
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Prebuilt Reports - Universal File Layout (UFL)

The Universal File Layout (UFL) includes the data field names, types, lengths, categories and descriptions that are used as functional fields for basic features in all solutions. The UFL is used as the official data format for all OrgPublisher 11 Prebuilt Reports. By formatting data following the specific field order and field value definition of the UFL, you can choose from the many Prebuilt Report templates provided with the OrgPublisher.

The Universal File Layout contains a color coded legend in the upper left corner to help you identify where your data should be mapped. The first two field sections must be mapped with your associated data. Any field you want to use that does not map to the specified fields in the Universal File Layout should be considered as a custom field.

In addition, the file layout specifies when a field is required or, perhaps, conditionally required, depending on the solution you have chosen and the data you want to view and analyze.



Aquire Confidential and Proprietary

Aquire Universal File Layout v3.0

HR Record

Data Field Group Legend	
OrgPublisher Standard Fields	1 - 19
Common Generic Fields	20 - 52
Insight Standard Fields	53 - 62, 100 - 104
Succession Standard Fields	63 - 78
Compensation Standard Fields	79 - 99, 106
Reserved for Internal/Future Use	107 - 149
Custom Fields	150-299
OP Reporting Metrics	300+

If a data field does not match the data type, max length or category specification of one of the standard UFL fields, the customer should create a new custom field.

* All date fields should be formatted as YYYYMMDD

	Data Field	Data Type	Max Length	Category	Field Description	Notes	Product Notes	HRIS Mapping
1	**Parent Box Unique Identifier**	character	128	box	The **Parent Box Unique Identifier** is the **Box Unique Identifier** of the parent box, or an empty string if there is no parent box.	This field is not displayed.		
2	**Box Unique Identifier**	character	128	box	The **Box Unique Identifier** is any string of any characters that uniquely identifies a box within the chart, or an empty string for an uncharted person.	If the source data does not have a **Box Unique Identifier**, the **Position Unique Identifier** or the **Person Unique Identifier** can be used for the **Box Unique Identifier**. If more than one record in the data has the same **Box Unique Identifier**, all of the box-level data on those records must be identical. This field is not displayed.		
3	**Box Title**	character	256	box	The **Box Title** is displayed at the top of the box in the org chart.	The **Box Title** must not be blank, and usually contains an org unit name, a cost center name, or a department name.		
4	**Position Type**	character	64	position	The **Position Type** is the type for the position. Box formatting is based on the position type of the first position in the box.	There are built-in position types like "E" (employee), "M" (manager), "A" (assistant), "C" (contractor), and "PR" (partner). In addition, any group of characters enclosed by angle brackets (<>) constitute a *custom position type* (e.g., "<Senior Vice President>"). This field is not displayed.	**Compensation**: By default position types for managers are used to conditionally format boxes based on plan status. For non-managers the position type is set to <Non-Manager>. Leave this field empty unless certain segments of the population should be displayed in the chart but excluded from the planning forms and reports, such as <Contractor> or <Non-Exempt>.	

Figure 6.

OrgPublisher uses data specifically geared toward the type of report or chart you want to create. Several fields are reserved for future use by the OrgPublisher application, and custom fields use data rows 129 and up.

The **Notes** column contains product specific information that may not pertain to the field when used in a different solution.

The **HRIS** column used for your SAP® solution field names, where applicable.

It is important that the data feed include all fields, even should they be left blank since no associated HR data is being provided for a select number of fields.

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Prebuilt Reports - Create a New Report

To create a chart by using a Prebuilt Report:

1. Open the New Chart Wizard.
2. Select **Organizational chart using Prebuilt Reports** and click **Next**.

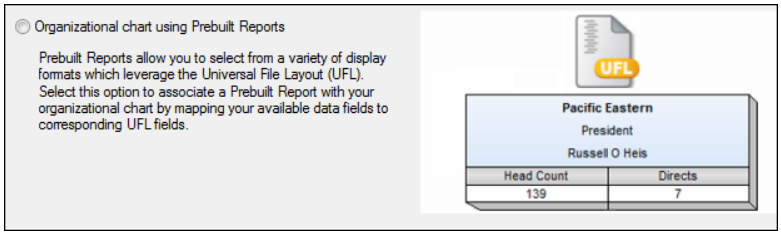

Organizational chart using Prebuilt Reports
Prebuilt Reports allow you to select from a variety of display formats which leverage the Universal File Layout (UFL). Select this option to associate a Prebuilt Report with your organizational chart by mapping your available data fields to corresponding UFL fields.
UFL
Pacific Eastern
President
Russell O Heis
Head Count
Directs
139
7

Figure 7.

3. Choose a report category and a Prebuilt Report within the chosen category, and then click **Next**.

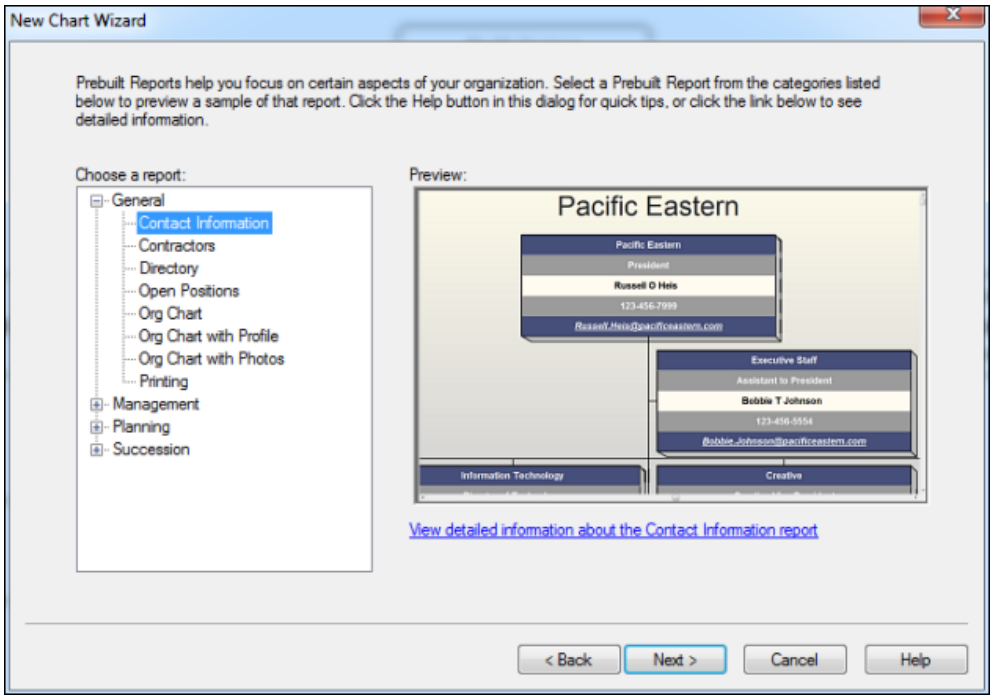


Figure 8.

4. Select your data source and click **Next**.

   Note: This wizard dialog provides a link to a PDF with additional information about your selected report.

5. Your data source selection will determine your next steps. Complete your data link and click **Next**.
6. If the first row in your data file contains column names click the **First row contains column names** box and click **Next**.

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7. If your data is already in the standard UFL (Universal Format Layout) field order, accept the default selection, and click **Next**.

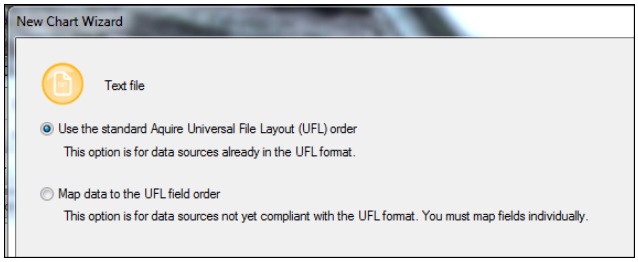

New Chart Wizard
Text file
Use the standard Aquire Universal File Layout (UFL) order
This option is for data sources already in the UFL format.
Map data to the UFL field order
This option is for data sources not yet compliant with the UFL format. You must map fields individually.

Figure 9.

If your data is not in the standard UFL select the **Map data to the UFL field order** radio button.

8. Review the Preview of the data for accuracy and click **Next**.
9. Click **Finish**.

Prebuilt Reports - Map Data to the UFL Field Order

When creating a new chart using the Prebuilt Reports option, and your data is not already mapped to the Universal File Layout, the *New Chart Wizard* allows you to manually map the field order.

1. Select the **Map data to the UFL field order** radio button in the New Chart Wizard.

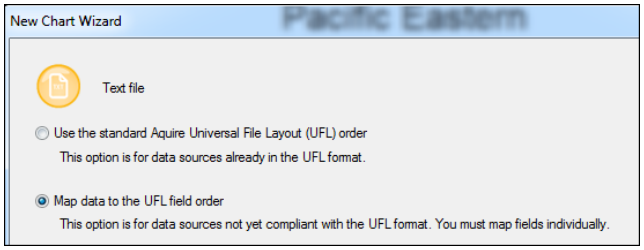

New Chart Wizard
Text file
Use the standard Aquire Universal File Layout (UFL) order
This option is for data sources already in the UFL format.
Map data to the UFL field order
This option is for data sources not yet compliant with the UFL format. You must map fields individually.

Figure 10.

2. Select how you want to sort the data fields, by **Field name** or by **Field position**. Click **Next**.

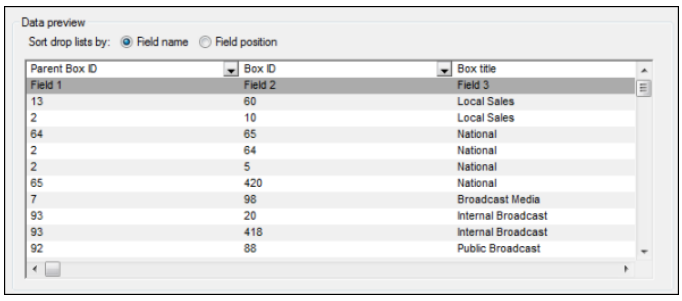


Figure 11.

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3. Select the drop-down arrow in each column, and map the appropriate field to the UFL field order. When all columns are mapped, click **Next**.

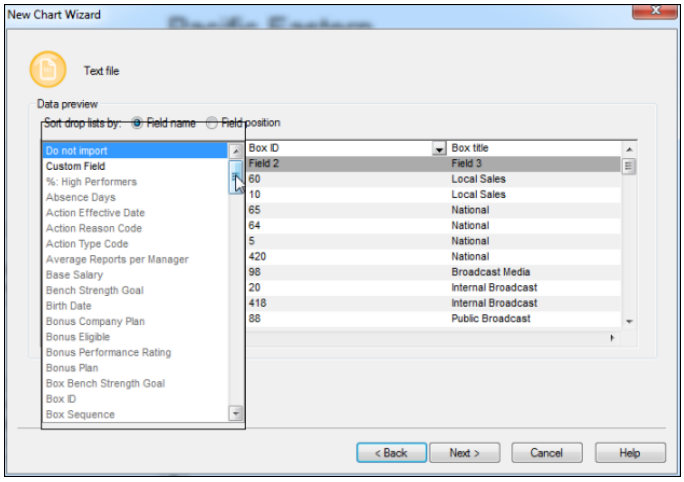


Figure 12.

4. If the *Preview of the data* dialog indicates that you have mapped your fields correctly, click **Next**. Click **Finish** to complete the wizard and open the Prebuilt Report.

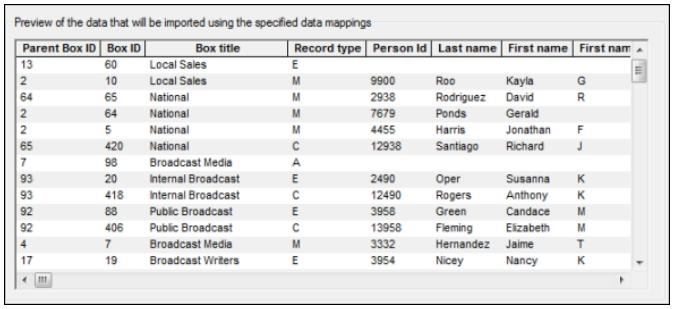

Preview of the data that will be imported using the specified data mappings
Parent Box ID | Box ID | Box title | Record type | Person Id | Last name | First name | First nam
13 60 Local Sales E
2 10 Local Sales M 9900 Roo Kayla G
64 65 National M 2938 Rodriguez David R
2 64 National M 7679 Ponds Gerald
2 5 National M 4455 Harris Jonathan F
65 420 National C 12938 Santiago Richard J
7 98 Broadcast Media A
93 20 Internal Broadcast E 2490 Oper Susanna K
93 418 Internal Broadcast C 12490 Rogers Anthony K
92 88 Public Broadcast E 3958 Green Candace M
92 406 Public Broadcast C 13958 Fleming Elizabeth M
4 7 Broadcast Media M 3332 Hernandez Jaime T
17 19 Broadcast Writers E 3954 Nicey Nancy K

Figure 13.

If the preview indicates that you have mapped fields incorrectly, click **Back** and repeat Steps 3 and Step 4.

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View Manager Names in Matrix Report Hover Display

The Matrix Hover Display feature contains an enhancement that allows you to see the manager name of an employee who is an indirect report. If your chart contains indirect reports, the chart administrator must:

- Add a custom field for the Indirect Manager
- Specify the formula to use on that field
- Format the chart to display the Hover view, the icon, and the position of the new field

Adding the Indirect Manager Field

1. In the Main menu, click Data and then select Custom field properties from the drop-down.

   The Custom Field Properties dialog opens.

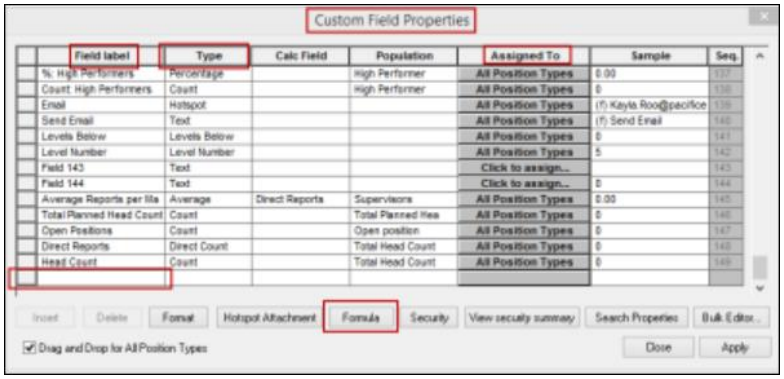


Figure 14.

2. Go to the bottom of the **Field label** column and click the box next to the last blank line.
3. Type **Manager**, or any other label you want to use, in the **Field label** column.



Figure 15.

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4. Click the box in the **Type** column and select **Text** from the drop-down.
5. Click the box in the **Assigned To** column and select **All Position Types**.
6. Click the **Formula** button.

   The Formula dialog opens.

Entering the Formula for Indirect Manager

1. Type, or copy, the formula as it appears below into Formula input box.

   ```
   return = "$Name:$"+", "+"$First name:$" + "$Middle name:$"
   ```

2. Click the **Run Formula against parent record** check box.

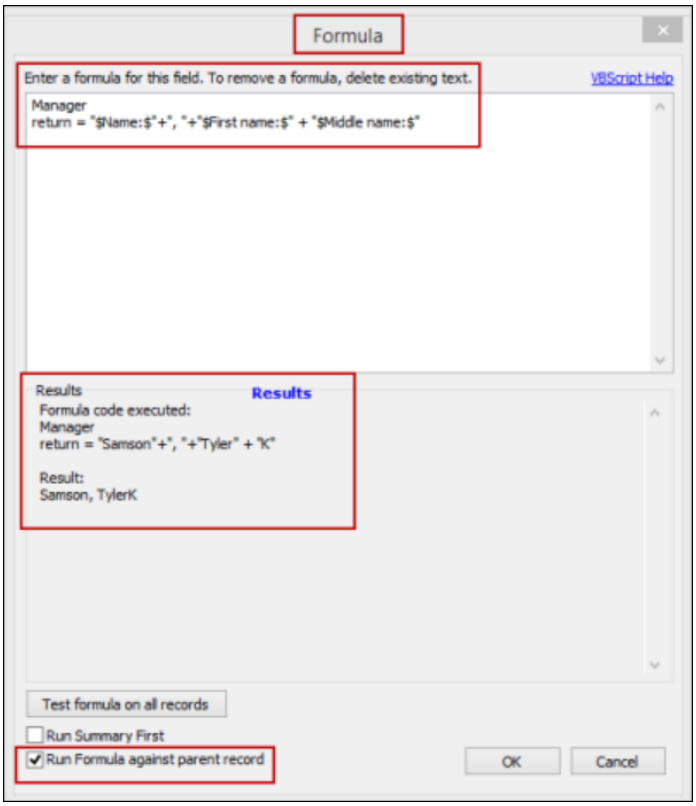


Figure 16.

If you don't receive an error, click OK and your formula is created.

If you do receive an error, repeat Steps 7-8.

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Formatting the Chart to View Matrix Hover Display with Manager

1. In the Main menu click **Format** then select **Chart** from the drop-down.

   The Format dialog opens at the **Chart** tab.

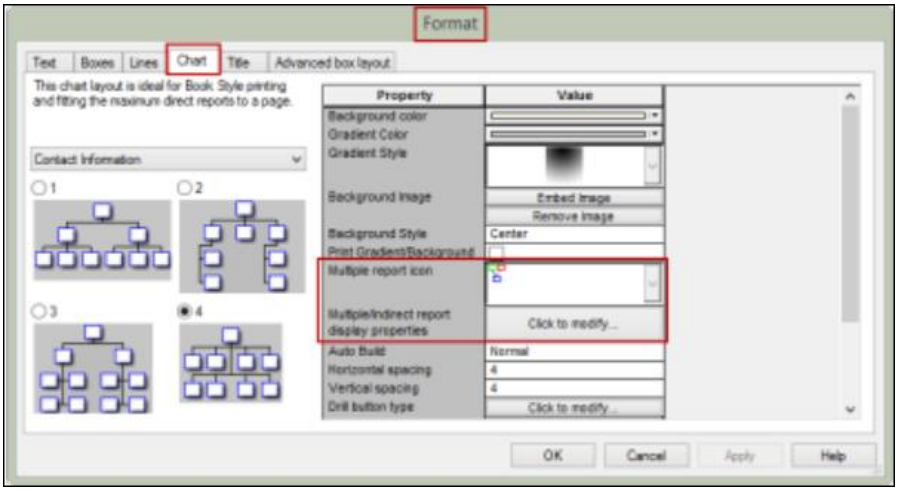


Figure 17.

2. In the **Properties** column, locate **Multiple report icon** and select an image to represent indirect reports from the drop-down.
3. In the **Multiple/Indirect report display properties** field, **Click to modify**.

   The Show/hide Fields dialog opens.

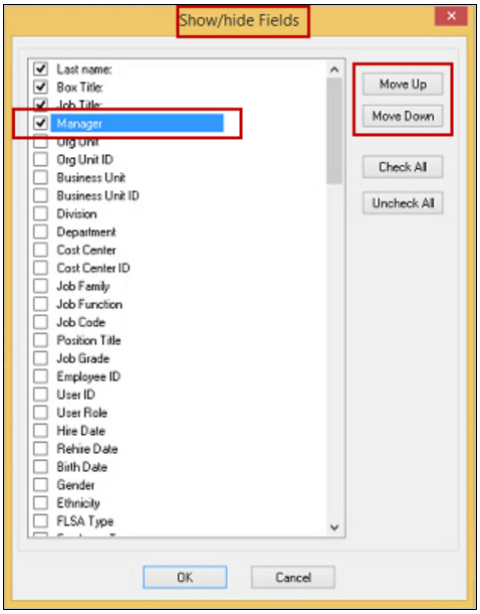


Figure 18.

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4. Find **Manager** (or the label name that you assigned) and select the check box.

   The new field typically is placed at the bottom of the list. If you are showing just a few fields in the matrix Hover Display, you must move the indirect manager field up in the list, as shown in the figure above.

   Click OK to accept the changes and close the dialog.

5. In the **Chart** tab of the Format dialog, use the slider bar on the right to scroll down to **Show Hover Profile** and select that check box.

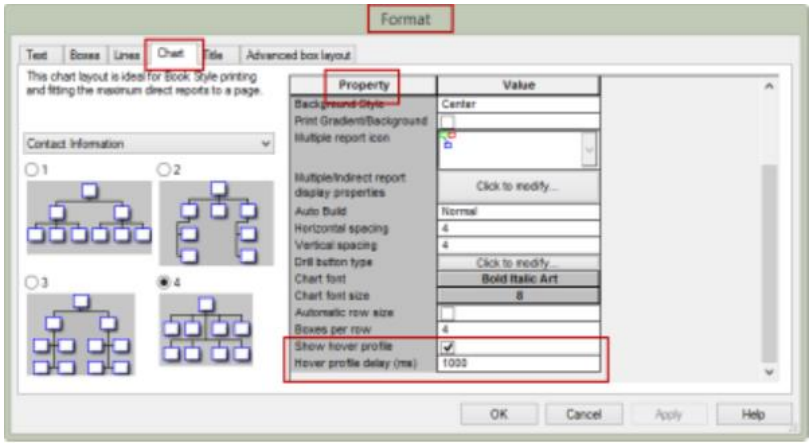


Figure 19.

6. In **Hover profile display (ms)**, accept the default of **1000**.

   Click OK to save your changes.

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Update Person Dialog

When building a chart from data, the information in this dialog is automatically populated. You can access this dialog when in Build Mode by selecting a name field and clicking in a blank spot in the field.

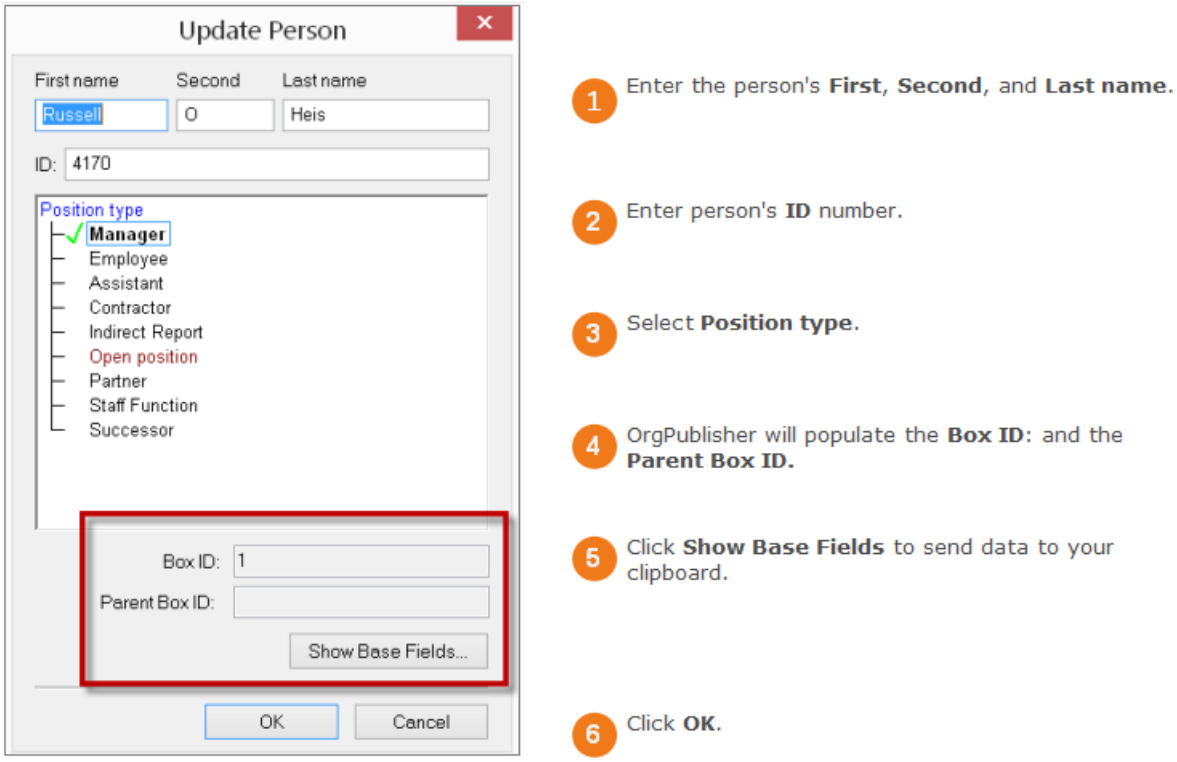


Figure 20.

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OrgPublisher Executive on Apple iPad

The new iPad® application enables C-level executives, line managers, and HR professionals to manage talent on the go, even when offline. OrgPublisher Executive can be downloaded from the Apple store, and works with an additional license in OrgPublisher Premier. Using the Publishing Wizard, you can publish employee data to OrgPublisher Executive on iPad.

The published data on the iPad device is presented in a different format from the traditional published charts. OrgPublisher Executive on iPad provides:

iPad Mobile Digital Device Feature
Secure access login
Fully interactive demo
Multiple employee data views
Level and filter options in views
Search feature
Email lists feature
Geographic mapping option
Ability to set maximum for records and levels
Multiple talent view analysis
Ability to determine sync schedule

Publish to OrgPublisher Executive on iPad

To publish employee data for viewing on an iPad mobile digital device, open the *Publishing Wizard*.

1. In the main toolbar, click 

.
2. Select **Advanced Mode** and click **Next**.
3. The next dialog is informational only. Click **Next**.
4. Enter a name for your chart and click **Next**.
5. Select **Interactive Org Chart** as *Publishing Type* and click **Next**.
6. Select **iPad** as *Interactive Type* and click **Next**.
7. Choose Email options. Click **Next**.
8. Select a Chart Style and Position Type to be used for formatting boxes in the org chart views. Click **Next**.
9. Select Enable Location View to display the *Geographic Mapping* for employees in your organization. Click **Next**.
10. Select a **Chart name** and **Publish to location** path for the published chart. Click **Next**.
11. Specify the URL of the virtual directory on the Web server and click **Next**.
12. Select a chart security option and related data, and then click **Next**.
13. Select the iPad Performance options and click **Next**.
14. Enable **Publish Notification Email** in case of a data error during publication, if applicable, and click **Next**.

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15. Create an archive of the published chart, if applicable, and click **Next**.
16. **Publish** to Intranet.

OrgPublisher Executive iPad Email Dialog

If you want to be able to send emails to employees from OrgPublisher Executive in iPad, you must select the field containing the email address. In addition, this dialog allows you to select the fields and groups you want to use in the filter, categorize, and analytics portions of OrgPublisher Executive.

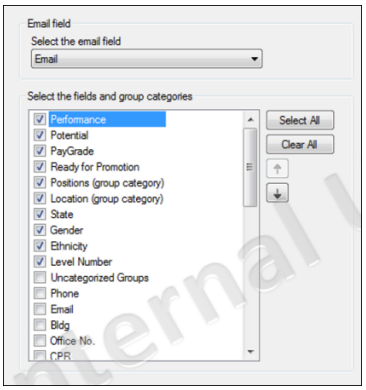


Figure 21.

1. Click the down-arrow in the **Select the email field**, and choose the field in your chart that contains the email address.
2. In the **Select the fields and group categories** list, click the check box for each field and group you want available for filtering, categorizing, and analyzing.

OrgPublisher Executive Chart Style and Position Type Dialog

When you publish to OrgPublisher Executive, you select a chart style and a position type to use as a basis for formatting boxes in the people and chart views in iPad. When you select a position type to use, the Publishing Wizard shows the fields that display in boxes in iPad.

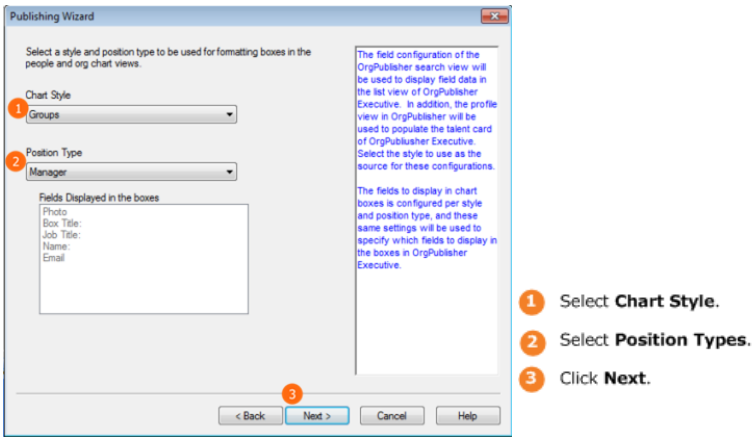

Publishing Wizard
Select a style and position type to be used for formatting boxes in the people and org chart views.
Chart Style
Groups
Position Type
Manager
Fields Displayed in the boxes
Photo
Box Title:
Job Title:
Name:
Email
The field configuration of the OrgPublisher search view will be used to display field data in the list view of OrgPublisher Executive. In addition, the profile view in OrgPublisher will be used to populate the talent card of OrgPubliusher Executive. Select the style to use as the source for these configurations.
The fields to display in chart boxes is configured per style and position type, and these same settings will be used to specify which fields to display in the boxes in OrgPublisher Executive.
< Back
Next >
Cancel
Help
1 Select Chart Style.
2 Select Position Types.
3 Click Next.

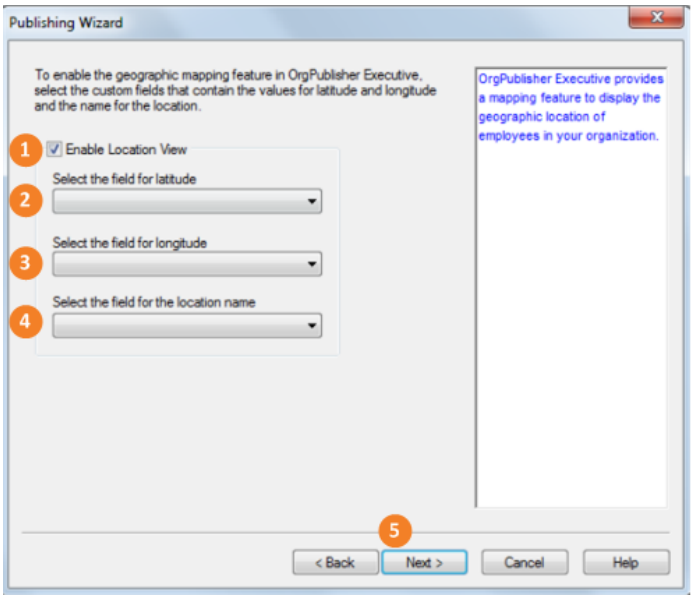
Figure 22.

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OrgPublisher Executive Geographic Mapping Dialog

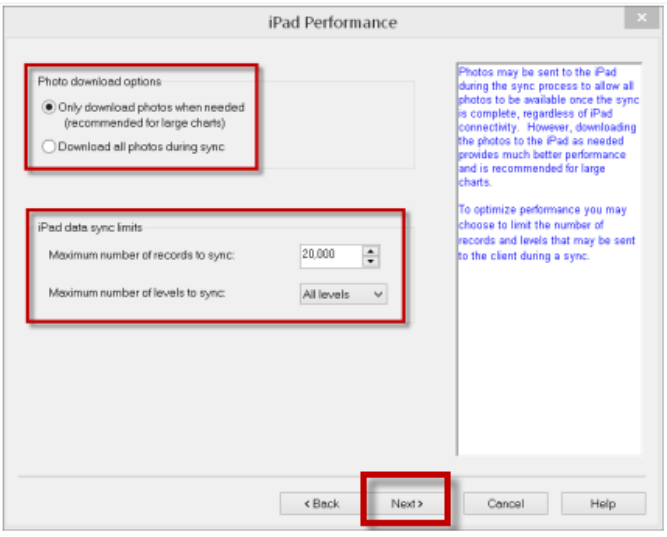
OrgPublisher Executive offers a mapping feature so that you can indicate, using latitude and longitude, where and how many employees are located in which cities or states.


Publishing Wizard
To enable the geographic mapping feature in OrgPublisher Executive, select the custom fields that contain the values for latitude and longitude and the name for the location.
OrgPublisher Executive provides a mapping feature to display the geographic location of employees in your organization.
1
Enable Location View
2
Select the field for latitude
3
Select the field for longitude
4
Select the field for the location name
5
< Back
Next >
Cancel
Help

1. Select the **Enable Location View** box.
2. Select the **Latitude** field.
3. Select the **Longitude** field.
4. Select the field for the **Location Name.**
5. Click **Next.**

Figure 23.

OrgPublisher Executive iPad Performance Dialog


iPad Performance
Photo download options
Only download photos when needed (recommended for large charts)
Download all photos during sync
Photos may be sent to the iPad during the sync process to allow all photos to be available once the sync is complete, regardless of iPad connectivity. However, downloading the photos to the iPad as needed provides much better performance and is recommended for large charts.
iPad data sync limits
Maximum number of records to sync:
20,000
Maximum number of levels to sync:
All levels
To optimize performance you may choose to limit the number of records and levels that may be sent to the client during a sync.
< Back
Next >
Cancel
Help

1. **Photo download options:**

   Photos may be sent to the iPad during the sync process to allow all photos to be available once the sync is complete, regardless of iPad connectivity.

   However, downloading the photos to the iPad as needed provides much better performance and is recommended for large charts.

2. **iPad data sync limits**

   To optimize performance you may choose to limit the number of records and levels that may be sent to the client during a sync.

3. Click **Next**

Figure 24.

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OrgPublisher Executive Chart Security Dialog

You can select the type of security to assign to OrgPublisher data on iPad. In addition to the options listed below, you can use the OrgPublisher hierarchical, custom field, and style/group security options.

Chart security options

- **Unsecured** – **All users can view the entire chart** enables anyone who has access to the OrgPublisher Executive application to view the chart data.

  – **Require PIN** restricts access to OrgPublisher Executive only to those users with your authorized PIN (Personal Identification Number).

- **Chart** – **User enters user ID and password** only allows users with assigned IDs and passwords access to the OrgPublisher Executive data.

  – **Allow user to cache password** option provides end users with the option to save their password information in OrgPublisher Executive.
  – **Password field** is selected from your custom field data.
  – **User ID field** is selected from your custom field data.
  – **Sync data starting at** option allows you the option to choose the level

- **Sync data starting at** defaults to **Supervisor's box**, to you can, instead, specify **Top of chart** or **User's box**.

- **Require** or **Recommend sync every X days** defaults to **15** days, but you can select a specific timeframe.

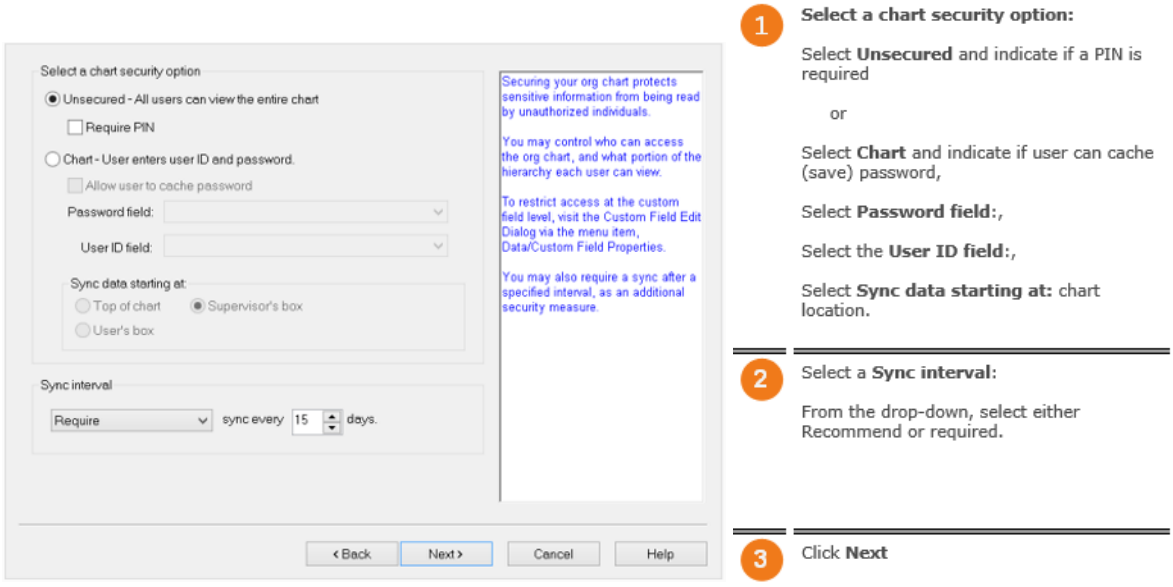

Select a chart security option
Unsecured - All users can view the entire chart
Require PIN
Chart - User enters user ID and password.
Allow user to cache password
Password field:
User ID field:
Sync data starting at:
Top of chart
Supervisor's box
User's box
Sync interval
Require
sync every 15 days.
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
You may also require a sync after a specified interval, as an additional security measure.
< Back
Next >
Cancel
Help
1
Select a chart security option:
Select Unsecured and indicate if a PIN is required
or
Select Chart and indicate if user can cache (save) password,
Select Password field:,
Select the User ID field:,
Select Sync data starting at: chart location.
2
Select a Sync interval:
From the drop-down, select either Recommend or required.
3
Click Next

Figure 25.

Note: During implementation of OrgPublisher Executive on iPad using Professional Services, you can modify the webconfig file to enable Active Directory security when signing in.

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11.7 New in OrgPublisher Executive for iPad

With this version of OrgPublisher Executive for iPad:

New

- IOS 8 compatibility
- Configurable logo

Enhancements

- Enchanced security options
- Employee photo load optimization
- Chart data label in URL path link
- Enhanced user interface buttons
- Updated support documents and email

New IOS Version 8

OrgPublisher Executive for iPad, version 11.7.0, has been updated for Apple IOS 8 compatibility.



Figure 26.

Enhanced User Interface Buttons

The Menu and Clear Filters buttons have been enhanced based on IOS 8 designs.

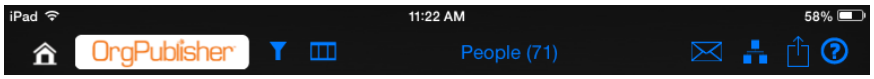


Figure 27.

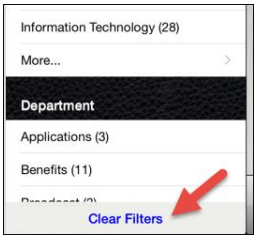


Figure 28.

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Configurable Logo

During the implementation process, you can configure OrgPublisher Executive to display your company logo.



Figure 29.

Enhanced Security Options

OrgPublisher Executive works with multiple network domains in support of Active Directory Authentication (AD). Companies with more than one AD network domain can now have users authenticated regardless of which AD domain they use.

This is accomplished with two steps. The first step occurs during the implementation process by modifying the **webconfig** file.

The second step is selecting the **Chart** option and the login and password fields in the Publishing Wizard.

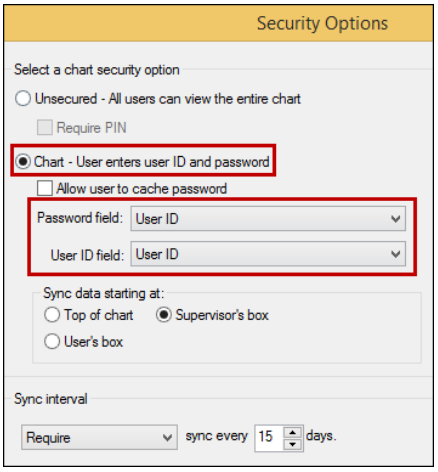


Figure 30.

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Employee Photo Load Optimization

OrgPublisher Executive offers an optional sync setting to update all employee photos during the sync process.



Figure 31.

Chart Data Label

You can display an identifying label in chart data URL by



Figure 32.

Updated In-Application Support

A Quick Start Guide is available to the iPad user.

OrgPublisher Executive is the mobile solution designed exclusively for business leaders to deliver actionable workforce intelligence in easy-to-understand, graphical reports.

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OrgPublisher Executive Quick Start Guide
Explore the Interface
1 Home Screen
Tap here to return to the home screen.
2 Search Bar
Search by name for a specific person.
3 Categorize By
Tap here to organize your view with a variety of categories.
4 Action Menu
Tap to send an email to all employees in your current view. Tap to access team view. Tap to export a list of employees to email or send feedback. Tap for help.
5 Filter Options
You can use multiple filters at once, and filters persist through all the views. Tap Clear Filters to clear the filters.
6 Boxes/Photos
Swipe up and down to view the people in your organization. The view changes dynamically based on your filtering and Categorize By criteria.
7 Talent Card
Tap a box to see work information and other professional details. Tap to send an email to the selected person.
8 View Options
Tap for People, List, Analytics, and Map views.
OrgPublisher
People (71)
Location
Austin (13)
Boston (11)
London (3)
New York (11)
Raleigh (20)
San Francisco (12)
Organization
CIO Office (1)
Disaster Recovery (11)
External Systems (11)
Global Systems (11)
HRIT (15)
More...
Clear Filters
Nancy Buchanan
Director Disaster Prevention
Manager
Dominic O'Reilly
Flight Risk: Low
Position Type: Regular Full-time
Loss Impact: High
Gender: Female
Potential: Medium
Performance: 3 - Effective
Organization: Disaster Recovery
Location: Austin
Work Email: shorey.russell@nomail.com
HRIT Analyst
Nevil Beachum
Systems Analyst
Nicole Brasile
Senior Systems A...
Krista Burleigh
Director Systems
Deirdre Catir
Global Systems A...
Mimi Cervantes
Global Systems A...
Lindsey Brandt
Director Disaster...
Nancy Buchanan
Senior Systems A...
Lorraine Chapman
People
List
Analytics
Locations
OrgPublisher Executive App v11.7.0
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Figure 33.

The guide identifies the action and task areas, as shown in the figure above…

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Learn the Basic Actions
Tap an Analytics graph to open a view of people in each category.
When viewing your hierarchy, tap here to move up in the hierarchy. Tap the icon below a person with reports to drill down into the hierarchy.
You can rotate your iPad and use the app in portrait mode. To access filters in portrait mode, tap at the top of the screen.
Drag or swipe up and down to scroll through the information.
Locations view shows the company population on a map. Tap a number to see the specific results.
List view allows you to tap the arrows to scroll and see additional information.
OrgPublisher Executive App v11.7.0
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Figure 34.

…as well as how to navigate on the iPad, as shown in the figure here.

Once downloaded and installed, the choices made by the OrgPublisher administrator when creating and publishing chart data to iPad, drive the initials actions, and determine the data and views available on iPad.

Updated Support Contact Information

The new email address for the Product Support team is:

orgpub.support@peoplefluent.com

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Bulk Editor Custom Fields Dialog

When working with a large number of custom fields, you can use the *Bulk Editor* dialog, accessed from the *Custom Field Properties* dialog.

1. Click **Bulk Editor** in the Custom Field Properties dialog.

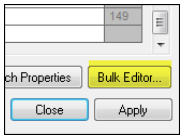


Figure 35.

The *Custom Field Bulk Editor* dialog opens, displaying all custom fields in your database.

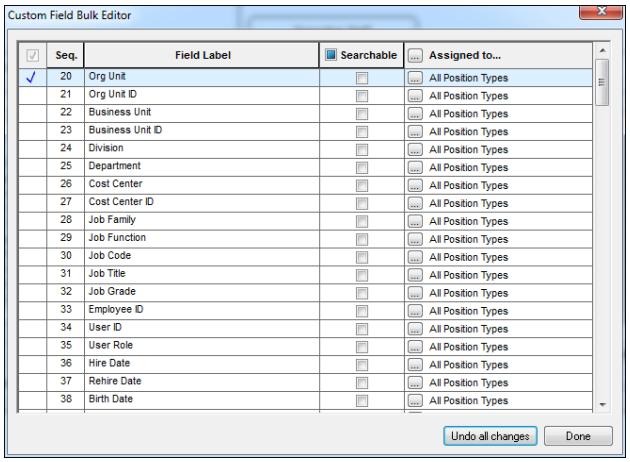


Figure 36.

2. Select individual custom field records, or select the check box at the top of the first column to select ALL custom fields.

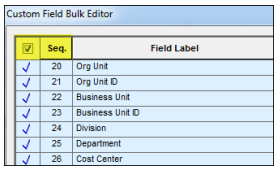


Figure 37.

3. Select individual check boxes for custom fields that you want to allow end users to search in the published chart. Or, select the check box at the top of the **Searchable** column to allow end users to search for All custom fields in the published chart.



Figure 38.

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All check boxes in the column are selected.



Figure 39.

4. Assign individual custom fields to position types by clicking **Assigned to** at the top of that column.

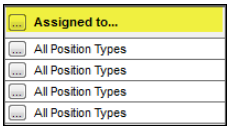


Figure 40.

5. The *Update Assigned Custom Fields* dialog opens. Select the **Position type** and the field you want to display the custom field. Click **OK**.

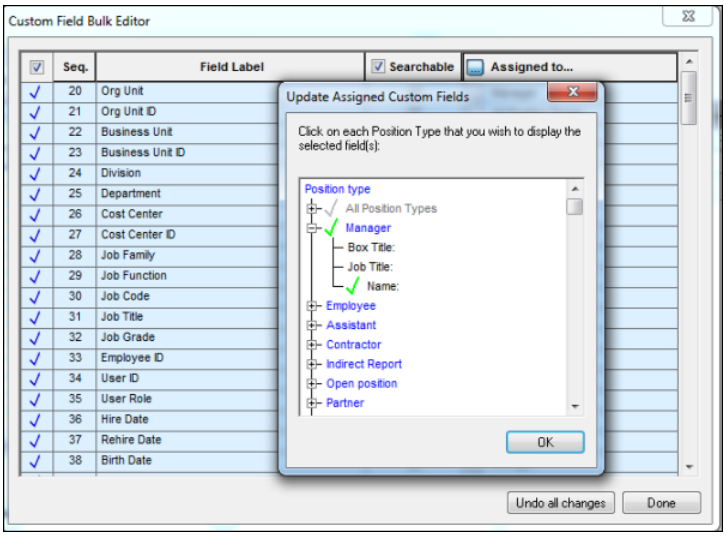


Figure 41.

All custom fields now display the position type selected through the Bulk Editor.

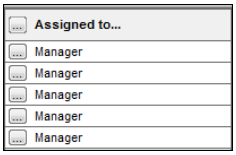


Figure 42.

6. Click **Done** to accept the changes and close the dialog. Or, click **Undo all changes** to clear all of your selections. Click **Done** to close the dialog.

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Bulk Editor in Profile View

1. Right-click on a field in the *Profile View*.
2. Select **Configure Profile View** from the drop-down list. The *Configure Profile View* dialog opens.
3. You can show or hide fields and headings by selecting the adjoining check box. A check indicates the field is displayed. A blank box indicates that the field is hidden.

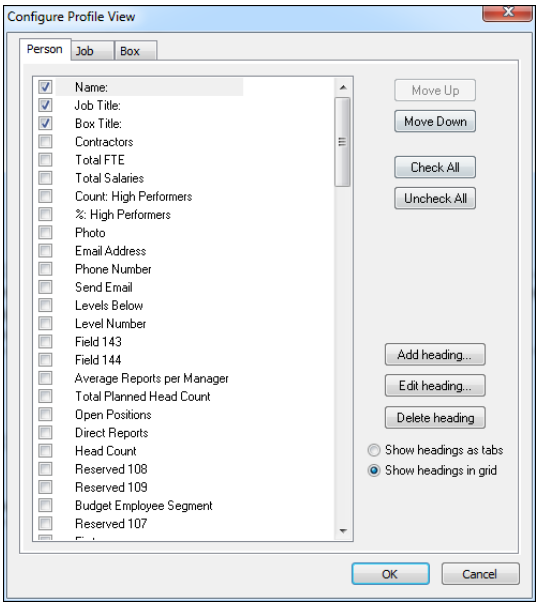


Figure 43.

The bulk editing option now allows you to select all the fields using the bulk editor feature.

4. Click **Check All** to select all fields. To reverse that action, click **Uncheck All**.

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Before You Begin

Before you create your first chart you would benefit from familiarizing yourself with information about licensing, system requirements, directory structure, user roles, and several other topics covered in this section.

Licensing Information Dialog

1. Access this dialog by clicking **Help** in the Main menu, then **License Information** in the options list.

   The *Licensing Information* dialog lists your license key, the features enabled by your license, the position count you are licensed to chart, and the license expiration date.

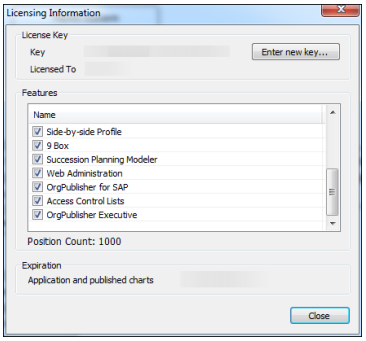


Figure 44.

2. Click **Enter new key** to enter a newly obtained OrgPublisher license key.

Entering a New License Key

If you, as an administrator, request a license upgrade or a trial extension of OrgPublisher, a new license key is provided by your sales associate.

1. When you receive the new key, open OrgPublisher and select **Help** in the Main menu.
2. Select **License Information** from the options list. The *Licensing Information* dialog opens, showing your license number and all features currently enabled, as well as your **Position Count** and expiration date, if applicable.
3. Click **Enter new key**. The *License Key Entry* dialog opens.
4. Copy the provided key from your e-mail message and click **Paste Key**. The license key displays in the **Please enter a license** field.
5. Type your company name in the **Registered Company** field. Click **OK** to accept the new key.

   If an error message displays stating you have entered invalid information, click the **Back** button and verify that the license key and company name are correct and retry.

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Entering a New License Key Using Web Administration

If you, as a server administrator for Web Administration, request a license upgrade or a trial extension of OrgPublisher, a new license key is provided by your sales associate.

1. When you receive the new key, a server administrator must log into the server and locate the installation folder. (The default path is **c:/program files/orgpub11**.)
2. Run the **OrgPub32.exe** file in that root folder to open OrgPublisher and select **Help** in the Main menu.
3. Select **License Information** from the options list. The *Licensing Information* dialog opens, showing your license number and all features currently enabled, as well as your **Position Count** and expiration date, if applicable.
4. Click **Enter new key**. The *License Key Entry* dialog opens.
5. Copy the provided key from your e-mail message and click **Paste Key**. The license key displays in the **Please enter a license** field.
6. Type your company name in the **Registered Company** field. Click **OK** to accept the new key.
7. Reset IIS to activate the key in the registry by restating the remote administrator server.

   If an error message displays stating you have entered invalid information, click the **Back** button and verify that the license key and company name are correct and retry.

> **Note:** Only the OrgPublisher administrator, logged into the server, can successfully enter a license key on the computer where OrgPublisher resides. The new license information is read when the remote administration server starts, after IIS is refreshed.

Providing Access to End User Help Pages

When you publish a chart using PluginX or EChart you can provide the URL to help pages you create or allow end users access to the end user help pages on our web site.

The Publishing Wizard includes a dialog in which you can type or browse to the location of help pages meant for end users of your published charts.

1. Click the Publish 

button in the toolbar. You can also select **Tools** in the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the *Publishing Wizard*.
2. Follow the dialog prompts until you reach the dialog enabling you to select several different options, such as creating a directory view, opening hotspots in the same or a new browser, or entering a URL for the PluginX help file.
3. If you want end users to access pages on your intranet, type the location of the end user help files you want to use in the If applicable, type a URL for a PluginX help file field.
4. Complete the *Publishing Wizard* and publish your chart.

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5. Open the published chart and click the **Help** button in the toolbar. The custom help files open in the web browser. If you do not type a custom URL, the **Help** button opens the default end user help page.

Using Row Level Security

> **Note:** If you want to implement row level security, you must first contact Professional Service.

Once you have implemented this feature with Professional Services, you can create an Access Control List (ACL) file and use it to control row level security in the chart. Row level security allows select employees access to sensitive information needed to make informed decisions, while, at the same time, preventing other employees from seeing this data. An ACL file is a comma-delimited list of **UserID**, **Type**, and **TargetValues**.

Before you begin creating the ACL file, there are certain things you must know, such as box IDs, and who should or should not have access to specific box infirmation. Based on this, you can determine which model (**Grant** or **GrantDeny**) you need to use.

Once you have created the ACL file, verify that it is saved in the same location as your chart, and that it is named exactly the same as your chart.

> **Note:** Enabling Org Modeling or Succession planning features in a published secure chart that contains one or more formula fields that have security restrictions set may expose that data when using row level security. Please test this before publishing.

Creating an ACL File for Row Level Security

Available in OrgPublisher Premier, an Access Control List (ACL) file must be created first in order to provide row level security. Viewing the ACL Preparation list may be helpful before beginning this procedure.

1. Open Microsoft Notepad or any other text editor and type the first line as the header. There will be two or three tokens, or pieces of information.
    a. **Security Model** = "Grant" or "GrantDeny"
    b. **Security field ID** = typically boxid "2"
    c. **Access designation for the GrantDeny model** = "True" (allows access to unsecured boxes) or "False" (denies access to unsecured boxes) For example: Grant,2,False

    > **Note:** You can designate an access for the Grant model, but if left blank, the Grant model will always deny access to unsecured boxes, regardless of a true or False designation.

2. The remainder of the lines are the ACL comma delimited lists. Follow the ACL List formats. For example: **SteppA,G,22,24,26,58** (where **SteppA** is the user; **G** is the Grant type; **22**, **24**, **26**, and **58** are the box IDs that can be accessed by Amy Stepp)
3. Save the file using the name of the published chart, with the extension of **.acl**, **publishedchartname.acl**, and place it in the same location as the published chart.
4. Republish the secured EChart to verify the row-level security works as you want it. A log is created each time you publish the chart using the ACL file for row level security, with the same name as the chart and .acl file, publishedchartname.log, if the user has write privileges on his computer. This file is also in the same location as the published chart.

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Prepare Chart Data

This section explains what you need to do to prepare your data for uploading to OrgPublisher. After the data is prepared and uploaded, you are ready to create your chart.

Topics Pertaining to this Section	
Input File Layout Rules	Identify a Broken Hierarchy
Linking to Your Data Source	File Types
Selecting a Data Source	Record Types
Extracting Your Data	Boxes and Position Types
Creating a Custom XSLT File	Creating and Using a Semantic Dictionary for Intelligent Searches
Creating an OCB File	

Input File Layout

The Input File Layout defines the order of columns in the comma-separated text file that OrgPublisher opens to generate your org chart. It also specifies the order of fields to send to OrgPublisher when you choose to generate org charts automatically using the Component Object Model (COM) interface.

This layout does not apply to charts created using the Prebuilt Reports.

Column number	Field name	Description
1	**Parent Box ID**	A required field, the parent box ID can be any string of numbers and/or characters that represent the report to box of this record. The data type for fields 1 and 2 should match, for instance, if field 1 is numeric, then field 2 should be numeric. The parent box ID is not displayed in the chart. Only the top person in a chart will have an empty parent box ID.
2	**Box ID**	A required field, the box ID can be any string of numbers and/or characters that uniquely represent a box within the chart. This ID can be duplicated for several records when multiple people are located in the same box. The box ID is not displayed in the chart. The data type for fields 1 and 2 should match, for instance, if field 1 is numeric, then field 2 should be numeric. You can add a unique box ID, typically an employee ID from your database. You can also use a position code if you use position management. Where the employee is placed in the chart depends on the Auto Build option the position type priority, and the Sort option. **Note:** If you use the matrix reporting, or multi-relationship feature in OrgPublisher, the box ID for the person reporting to more than one person must be unique for each instance in the chart in order ensure correct drilling up through hierarchy.
3	**Box title**	The Box title field is optional. The box title can be any string of numbers and/or characters and is shown as the top text entry in the org chart box that it describes. This can be a cost center or full department name. The box title should be unique to the box ID that is also contained in this record. The same box title is displayed in every record that contains this box ID.

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Column number	Field name	Description
4	**Record Type**	An optional field, but if left blank it will default to **E** for Employee. Record type defines the position type of each person in your organization. OrgPublisher provides several predefined record types. You can also create custom record types to define other positions in your organization. Record types for custom position types using more than one character should use brackets, for example **<MT>.** **M** = Manager **E** = Employee **A** = Assistant **C** = Contractor **I** = Indirect report **PR** = Partner **<SF>** = Staff Function **<SC>** = Succession Candidate **B** = Box You cannot insert a person in a **B** record type. It is typically used to display org units or departments only.
5	**Person ID**	The person ID field is optional. It can contain any string of numbers and/or characters to represent the ID or unique identifier for a person, such as employee ID. With OrgPublisher version 5 and later this field is used to add a person to a group and to identify a person in order to add a multi-relationship icon. Therefore, the field is displayed and searchable by end users. Do not store sensitive information, such as a social security number, in this field. Example: "1","2",”ABC Department”,"M","9-999999",”Smith”,”Rose”,,"JOB001",”Supervisor"
6	**Last Name**	An optional field, the last name field represents the last, or family, name of the person a record represents. If left blank, OrgPublisher inserts an open position. Example: "1","2",”ABC Department”,"M","9-99999999",”Smith”,”Rose”,,"JOB00"1,”Supervisor” **Note:** An Input File record represents an Open position when the Last Name, First Name, and Middle Name fields are empty. Example: "1","2",”ABC Department”,"M","9-99999999",,,,"JOB001",”Supervisor”
7	**First Name**	An optional field, the first name field represents the first name of the person that a record represents. Example: "1","2",”ABC Department”,"M","9-99999999",”Smith”,”Rose”,,"JOB001",”Supervisor” **Note:** An Input File record represents an Open position when the Last Name, First Name, and Middle Name fields are empty. Example: "1","2",”ABC Department”,"M","9-99999999",,,,"JOB001",”Supervisor”
8	**Middle Name**	An optional field, the middle name field represents the middle name of the person that a record represents. Example: "1","2",”ABC Department”,"M","9-99999999",”Smith”,”Rose”,”L”,JOB001,”Supervisor” **Note:**

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Column number	Field name	Description
		An Input File record represents an Open position when the Last Name, First Name, and Middle Name fields are empty. Example: "1","2",”ABC Department”,"M","9-99999999",,,,"JOB001",”Supervisor”
9	**Job ID**	The job ID can be any string of numbers and/or characters that uniquely represent a job title or position title within the chart. If records are combined into one box, job titles are defaulted to list in ascending sequence by job ID and are sorted within each position type. The job ID is not displayed in the chart. This field is used in Auto Build.
10	**Job Title**	The Job Title field is optional. The job title can be any string of numbers and/or characters and is shown above the individual name within a box. A job title is associated with the first position type beneath the job title. The priority of the position type determines the order of job titles of different position types appearing within a box. You can override the priority by assigning the sequence number in field 13 of the comma-delimited text file. In the following example, each record that contains job ID "JOB001" also contains the job title "Supervisor." Example: "1","2",”ABC Department”,"M",,"Smith",'A',,"JOB001",”Supervisor” "1","3",”ABC Department”,"M",,”Turner”,”B”,,"JOB001",”Supervisor” "1","4",”ABC Department”,"M",,”Brown”,”K”,,"JOB001",”Supervisor”
11	**Reserved**	Field 11 is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data, and to ensure compatibility with future versions of OrgPublisher, leave this field blank.
12	**Box Sequence Number**	Field 12 is the box sequence number and accepts only numeric (integer only) characters. It can be used, but is not required, to override the default positioning of the boxes. By default, boxes are positioned from left to right (level by level) in your chart alphabetically by box ID. This field is used when you select the Sort by box ID option of the OrgPublisher Sort feature.
13	**Job Sequence number**	The job sequence number accepts only numeric (integer only) characters. It can be used, but is not required, to override the default positioning of the job title. By default, job IDs are used for sorting multiple jobs within a single box, such as people in the same box as their manager.
14	**Position Sequence Number**	The position sequence number can be used, but is not required, to override the default positioning of the employee name, and must be numeric (integer only) characters. By default, multiple employee names are sorted alphabetically within a single box.
15	**Photo**	The file names of the photos in your chart are stored in the photo field. Add photos with the Photo Wizard so that you can specify a common path for all of your photo files. If photos are stored in different areas you must put the full path name in this field.
16	**Reserved**	Fields 16 is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data and to ensure compatibility with future versions of OrgPublisher, leave this field blank.

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Column number	Field name	Description
17	**Position ID**	OrgPublisher looks for Position ID in field 17. Position IDs are used for: Tracking position movement in OrgHistory when comparing charts. Tracking what positions have been pinned in the side-by-side Profile View. Unique position IDs are very important for continued synchronization. It's preferable to have position IDs in the source data if you want to tie changes back to the source system. **Note:** If you choose not to use this field for Position ID, it must be left blank. You can also use a unique identifier in field 5 that OrgPublisher will use if field 17 is blank. If both fields are null, you can, instead, set up a custom field with the Type selected as Position ID.
18	**Level Number**	Level number is used to pass in your levels for use in the multi-level peer display. This is a numeric absolute value level, for instance, if the manager grade level is 10 and the report-to is 1, OrgPublisher charts the report-to box as 9 levels below the manager box. The level number is a differential from the parent level number, either in ascending or descending order. The sequence cannot change in the middle of the "chain." There are 10 levels to work with at each parent box level; any differential greater than 10 displays at the same level as 10. If there is no value in the parent box, it is assumed to be 0 (zero).
19	**Reserved**	Field 19 is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data and to ensure compatibility with future versions of OrgPublisher, leave these fields blank.
20-25	**Custom Fields**	Input in fields 20 and up are for your custom fields, such as phone numbers, room numbers and hotspot URLs. After populating these fields in the Input File with your custom data, open the Custom Field Properties dialog and select where these fields should be displayed in your chart. A default label is supplied that you should type over. This example shows custom fields of hire date and phone number in Positions 20 and 21. If you plan to use the EChart security option, custom fields must be created to hold the unique identifiers for both the Password and User ID. Example: "1","2",”ABC Department”,"M",,”Smith”,”A”,,"JOB001",”Supervisor”,,,,,,,,”1995/12/02”,”2495” **Note:** When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher. You can add leading and trailing symbols to numeric fields with the Field Format dialog, but the decimal places **cannot be adjusted** after they are imported. OrgPublisher does not change the value of numeric fields you bring in. For instance, if you import 341.00, that's what the number is in OrgPublisher. If you import 341, that's what OrgPublisher uses. Formatting cannot change the value of the data you import.
26-49	**Custom Fields and Summary Fields**	Fields 26 - 49 and 65+ can be used for custom fields, as well as summaries. In OrgPublisher Premier, you can perform basic calculations on numeric custom fields in your chart and display this data in a summary field in your org chart. Note: The Summary Wizard inserts placeholders, if necessary, which display in the Custom Field Properties dialog. These fields within OrgPublisher, occupy sequences 20 -25, and are designated as field types other than summaries, such as Text, Hotspot, or Email. As you create summary fields, OrgPublisher starts placing them in sequence 26.

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Column number	Field name	Description
		When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher. For example, you can calculate the total sales for a department and display that information in a summary field. The Summary Wizard and Head count Wizard automatically place summary fields in the Input File.
50-64	**Succession Candidate Fields**	Input fields 50 through 64 are designed to be used with one of the OrgPublisher succession templates. After populating these fields in the Input File with your custom data, open the Custom Field Properties dialog and select where these fields should be displayed in your chart. Can be used to help define a successor group. Special formatting for a successor position comes automatically with OrgPublisher. If you are not using an OrgPublisher succession template for your chart, these fields can be used for any custom fields. Note: Initial formatting of the successor position type is handled in the default templates shipped with OrgPublisher. **50** - Key Person **51** - Location **52** - Age **53** - Salary **54** - Performance Rating **55** - Education Level **56** - Skills **57** - Certifications **58** - Competency Rating **59** - Successor Rank **60** - Designated Successor **61** - High Potential Rating **62** - Readiness **63** - Retention Risk **64** - Impact of Loss
65 and up	**Custom Fields and Summary Fields**	Positions 26 - 49 and 65+ can be used for custom fields, as well as summaries. In OrgPublisher Premier, you can perform basic calculations on numeric custom fields in your chart and display this data in a summary field in your org chart. **Note:** The Summary Wizard inserts placeholders, if necessary, which display in the Custom Field Properties dialog. These fields within OrgPublisher, occupy sequences 20 -25, and are designated as field types other than summaries, such as Text, Hotspot, or Email. As you create summary fields, OrgPublisher starts placing them in sequence 26. When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher. For example, you can calculate the total sales for a department and display that information in a summary field. The Summary Wizard and Head count Wizard automatically place summary fields in the Input File starting at Position 26.

Note: If you plan to use the Compare two Charts feature, it is strongly recommended that you create a custom field called Position ID, and assign a unique ID to each instance of a person in the chart. In addition, each open position should be assigned a unique ID.

An Input File record represents an open position when the **Last Name**, **First Name**, and **Middle Name** fields are empty.

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Example: "1","2","ABC Department","M","9-99999999",,,,"JOB001","Supervisor"

In addition to the predefined, required data fields of the Input File Layout, OrgPublisher provides the capability for an unlimited number of fields that can be imported and customized to include data that is unique to your environment.

The administrator maintains control over the custom fields to use in the planning chart. Planners cannot add or delete custom fields.

Input File Layout Rules

When mapping your data to OrgPublisher, keep in mind the following points. If you are working with the Prebuilt Reports features, you must map your data using the Universal File Layout (UFL).

> **Note:** A conditional formatting position type is used for formatting purposes only and does not override a position type pulled from your data source.

Fields

1. Each input record must be laid out according to the Input File Layout or Universal File Layout.
2. The first two fields in each record must contain the correct reporting relationship information before a chart structure can build successfully.
3. The first 10 fields in each input file must be mapped correctly, matching the OrgPublisher layout, although only the first two fields are required to contain data.
4. Field 5 must contain a unique person or employee ID if you intend to display multi-relationship icons in your chart. This ID should not contain sensitive information because it is displayed in the Update Person dialog and is searchable by end users.
5. Fields 11, 16, 17, and 19 are reserved fields for use by OrgPublisher. Populating field 17 with a unique position ID is strongly recommended when using OrgHistory.
6. Fields 12, 13, and 14 can contain sequence numbers (integers only) used by OrgPublisher. Field 12 is used to **Sort by box ID** in the Sort Options feature.
7. Field 4 contains the record type. The record type defaults to E (employee) when blank.
8. Use Field 18 for level numbers if you want to use the Multi-level Peer Display feature. The Multi-level Peer Display feature is not applicable to Assistant boxes and boxes reporting to Assistants.
9. Custom fields begin with Field 20 and can continue sequentially through the rest of the fields.
10. If you plan to use the Compare Two Charts feature, it is strongly recommended that you create a custom field called Position ID and assign a unique ID to each instance of a person in the chart. In addition, each open position should be assigned a unique ID.
11. Summary fields begin with Field 26 and can continue sequentially through the rest of the fields.
12. It is necessary to enclose fields in quotes only when there is a comma within the field, for example, "Smith,jr". The following record is valid, 0001,0002,Box title,B,,,,,,,.

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13. Make sure that the Input File does not contain the quote character within any field. The following record is invalid, 0001,0002,"Sales" Dept.", B,,,,,,,.
14. There should be no blank spaces or special characters (such as #, -, |, +, =, <, >, @, $, etc.) in field names.
15. You can create open positions in your chart by passing null records into the **Last Name**, **First Name**, and **Middle Name** input fields (Fields 6, 7, and 8).
16. When building a succession planning chart, select Specify custom field order to map your data. This allows you to map your data to standard Succession Candidate fields.

Record types

1. The Record Type defaults to E (employee) when blank.
2. Record types B and BA do not display names or job titles in the chart boxes.
3. Chart boxes are built in ascending sequence by Box ID.
4. Job titles display in ascending sequence by Job ID within each box.
5. Each record in an OrgPublisher file represents a position in the chart.
6. Custom position record types should be defined in your text input file. Select **Edit** from the menu bar, then **Define** from the pull-down menu to define Custom position record types. The record type should include before and after brackets, for example <T>.
7. The input records may be in any order.
8. If Box IDs are the same for two records and they report to the same manager, they will be placed in the same box.
9. Assistant boxes (record type BA) cannot have a reporting Assistant box.
10. Assistant boxes (record type BA) cannot have a reporting Partner box (record type P).
11. Boxes reporting to Assistant boxes (record type BA) cannot have reporting boxes.
12. Charts containing Succession Candidate (record type SC) contain no hierarchical information.

Data files

1. Use the same text file name each time you export data from your database. The text file name should match the template file (OTM) name and be located in the same directory as the template file. OrgPublisher creates the OTM file when you save your chart.
2. An input text file that does not have a corresponding template file (OTM) will be assigned a default template automatically by OrgPublisher.
3. Avoid naming your text data with the extension OCP. This is reserved for use by OrgPublisher when publishing a file.
4. There should be no blank records at the end of the file.
5. When the **AutoTitle** feature is enabled, the top box title displayed in the chart is used as the chart title.

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Linking to Your Data Source

You must know how to link to your data source to create your chart, manage your data, and resolve reporting relationship problems.

Your system administrator may need to provide some of the information required to connect to your database. To share a database connection file with another user, you must use a file **DSN** on a shared network path when you save the ODB file.

Use the New Chart Wizard to form an **SQL** statement that is used to extract data from your database. You can also write your own **SQL** statement. For query samples, refer to the Downloads section of the web site.

Once you have saved the file with your connection, you can reconnect to the same database by opening the chart's ODB file.

Selecting a Data Source

The New Chart Wizard helps you select the data source from which to create your org chart.

> **Note:** If you are creating a succession planning chart, see the Mapping Succession Planning Fields topic.

ODBC database - OrgPublisher establishes a direct connection to any ODBC - compliant database, retains all connection and field mapping information.

XML - OrgPublisher matches data in the XML format to the OrgPublisher input fields. If your XML data file contains an x-schema reference to the product schema, this reference must point to the downloaded OrgPublisher schema or the OrgPublisher schema must be copied to the directory containing your XML data file.

Text - OrgPublisher uses existing data in a comma-delimited text file for building an organization chart.

Multiple data sources - OrgPublisher allows you to build a single chart from more than one data source, choices include ODBC, XML, and Text.

Blank chart - This option allows you to open a blank chart to build your hierarchy manually.

Extracting Your Data

Once you have established person-to-person, position-to-position, or department-to-department relationships, you can begin building your charts automatically from data by mapping data in your HR system to the OrgPublisher input fields.

1. Map the fields in your database that link managers to their direct reports or reporting departments to managing departments to the following OrgPublisher input fields.

   Input Field 1 - **PARENT_BOX_ID**

   Input Field 2 - **BOX_ID**

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You can map an Employee ID field from your database to **BOX_ID** and a Reports To (or Supervisor ID) field to **PARENT_BOX_ID**. This creates an org chart where each person appears in their own box.

2. Define each input record with a default or custom position type in Input Field 4 - **RECORD_TYPE**.

   If you leave the record type blank, all positions in the chart default to **Employee** position types.

3. Map the employee name from your HR system to the Last Name, First Name, and Middle Name fields in the OrgPublisher Input File Layout.

   Note: If your database has only one field for the entire employee name, then map this field to the Last Name field.

   Each record can contain information about a person's position or job title. If your database does not store a key or code to identify each job title, you can map the job title field in your employee database to both the **Job ID** field and the **Job title** field in the Input File, or you can leave the **Job ID** field blank.

4. If you want to use multi-level peer display, you must define the level number in Field 18.

5. Map the rest of the fields according to the Input File Layout.

6. Save your comma-separated ASCII text file as an OCB, TXT, or CSV file.

7. Open your text file (example, MYCHART.OCB) in OrgPublisher.

   Your org chart is displayed and ready for you to format. When you save the chart, your formatting is stored in a separate template file with an OTM extension. When you re-import your data and open the chart, the styles and formatting remain unchanged.

Extracting Data into a Text File

Extract data into a comma-separated text file in the order required by the OrgPublisher Input File. You can save the comma-separated text file in an ODBC -compliant database, and then establish a database connection with OrgPublisher to reorder the data by selecting the appropriate columns in the New Chart Wizard.

Note: If you are creating a succession planning chart, see the Mapping Succession Planning Fields topic.

Creating a Custom XSLT File

As an alternative to downloading a valid XSLT file from the web site, you may want to create a custom XSLT file that is valid for your data.

To implement your own schema for translating XML data to the OrgPublisher input format, you will need to add the tag name and file name of your XSLT file to the **XSLTFileList.xml** file. This file is usually located in your **C:\Program Files\OrgPubX\TVXMLCon\XML** directory.

The following code samples are truncated to conform to this document's margin settings. When modifying this code make sure that there are no spaces inserted or this code may not perform properly. If you have any questions about this process, please contact Support.

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Sample of original XSLTFileList.xml file

<?xml version = ”r;1.0”?>

<OP40FileList>

<urn_schemas_biztalk_org_lawson_com_0q3yhkct_xml>LawsonToOP40V1.xsl</urn_schemas_biztalk_org_lawson_com_0q3yhkct_xml>

</OP40FileList>

Sample of modified XSLTFileList.xml file

<?xml version = ”r;1.0”?>

<OP40FileList>

<urn_schemas_biztalk_org_lawson_com_0q3yhkct_xml>LawsonToOP40V1.xsl</urn_schemas_biztalk_org_Lawson_com_0q3yhct_xml>

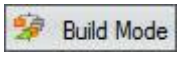
<x_schema_myschema_xml>mytoOP40V1.xsl</x_schema_myschema_xml>

</OP40FileList>

Note: The underscore (_) character must be substituted for period (.) and comma (,) characters.

Creating an OCB File

You can create an OCB file for an existing chart in order to automatically build an org chart.

1. Open the database connection chart file (ODB) for the chart.
2. Click the Build Mode 

button. A dialog opens stating that a text file will be created to save your changes.
3. Click **Yes**. OrgPublisher automatically saves the file in the same directory with the same name as the ODB file and a file extension of OCB.
4. Make changes to the org chart.

   Any changes you make to the format are saved in the chart template file (OTM), which means these formatting changes will also affect the original org chart (ODB).
5. Save your changes in the OCB file.

Note: If this is a chart file created as a succession planning chart, the file extension is ODBX.

Data in an OCB file cannot be refreshed in the same way as a chart created from a database connection (ODB file). You can reconnect to your database by opening the ODB file, and then saving it with the same name as the OCB file.

You will lose any prior data changes in the OCB file. Alternatively, you can open the OCB file and manually change the chart.

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Identify a Broken Hierarchy

One of the most valuable features in OrgPublisher is the ability to track reporting relationships. When you create your input file layout for your first chart and define your relationship hierarchy, OrgPublisher remembers that hierarchy. OrgPublisher determines if any of the established relationships are broken when you open your chart built from data.

The following is an example of the error message:

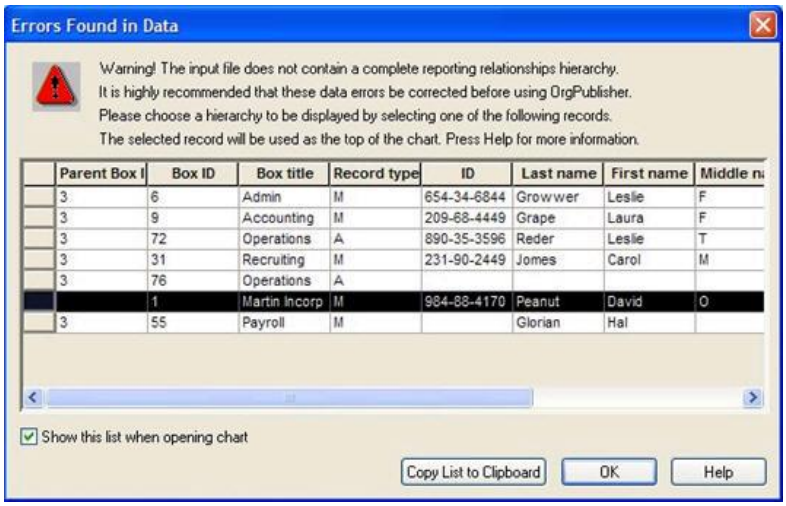

Errors Found in Data
Warning! The input file does not contain a complete reporting relationships hierarchy.
It is highly recommended that these data errors be corrected before using OrgPublisher.
Please choose a hierarchy to be displayed by selecting one of the following records.
The selected record will be used as the top of the chart. Press Help for more information.
Parent Box I
Box ID
Box title
Record type
ID
Last name
First name
Middle n
3 6 Admin M 654-34-6844 Growwer Leslie F
3 9 Accounting M 209-68-4449 Grape Laura F
3 72 Operations A 890-35-3596 Reder Leslie T
3 31 Recruiting M 231-90-2449 Jomes Carol M
3 76 Operations A
1 Martin Incorp M 984-88-4170 Peanut David O
3 55 Payroll M Glorian Hal
Show this list when opening chart
Copy List to Clipboard
OK
Help

Figure 45.

You can copy the list and use it to correct your HR database and then update your chart.

File Types

OrgPublisher potentially creates several types of files that contain different information for your chart.

File Extensions	File Contents
OCP	OrgPublisher published chart; if you are working with an EChart, contains information to contact the EChart server. PluginX - Binary chart/template file combined.
OTM	Template formatting file: OTM file matches the ODB, ODBX, or OCB chart file. Contains all formatting, custom field labels, publishing definitions, styles, and groups.
HTM	HTML code page: main chart page that determines the browser type and invokes the JS file for downloading the ActiveX Plugin. Also applicable to EChart, both thin and rich client.
OCB	HTML code page: contains chart data ASCII file; comma-delimited text file (in OrgPublisher format). Contains "static snapshot" of the data (not dynamic data).
ODB	Database connection file: contains ODBC connection and DSN information only, no chart data.
DLL	EChart chart file: contains DLL for both thin client and rich client. DLL file is named the same as the published chart file and must be in the same directory as the EChart OCP file. Needs to be configured in ISAPI Filter setup (IIS6) or Handler Mapping (IIS7).

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File Extensions	File Contents
OCS	EChart file for both thin and rich client types; contains EChart data; must be in the same web directory as the EChart OCP file.
BAT	EChart file for both thin and rich client; batch file that can be used for automated EChart publishing. See the Publish ECharts section of this document for detailed information.
OPW	Web Administration file.
ODBX	Multiple sources chart file: also pertains to single text data-source that is custom mapped or contains a header row. Maps information to text file only, contains no chart data.

Record Types

The record type is the position type of a person who works in your organization. A position type can be used to categorize employees. Position types assist in the formatting of boxes and text, and the calculations of various head counts within your organization. The position type/record type determines the order of positions within a single box.

Each person or position in an org chart is represented by only one record in the input file, but a person can occupy multiple positions and have multiple records. You can also create your own record type to define a position within your organization using the Position Type Wizard or the Define dialog.

If you leave the **Record Type** blank, OrgPublisher sets the position type to "Employee."

Do not use these characters when creating your own custom record type in field 4.

Record Type	Name	Definition
M	**Manager**	A manager record type represents a person who is the manager or supervisor of the people in the reporting boxes or within an org box. Manager record types have a Priority of **0**. They are placed in their own box unless the Auto Build option, in the Format dialog Chart tab, is set so that managers and employees are placed in the same box. When there is more than one manager under a job title within a box, the names are defaulted to sort alphabetically by last name.
E	**Employee**	This is the default record type. An employee record type represents a person who is an employee within an org box. You can format employee names and boxes separately from manager names and boxes. When there is more than one employee name under a job title within a box, the names are defaulted to sort alphabetically by last name.
A	**Assistant**	An assistant record type represents a person who is displayed within an assistant box type. Assistant boxes alternate right and left of the reporting line. You can define custom assistant position types with data using the Define dialog, accessed from the Edit menu option, by creating a new position type and selecting the assistant box type.
I	**Indirect report**	An OrgPublisher org chart can include indirect reporting relationships as well as direct reporting relationships. Indirect reporting relationships are also known as dotted-line relationships. An input record can indicate a person is an indirect report by using an "I" in the Record Type field in front of the assigned position record type. Indirect is a modifier of the assigned position type. For example, an IE is an employee who reports indirectly to another position. If you use only I as your record type, OrgPublisher defaults the record to IM.

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Record Type	Name	Definition
		When an indirect report appears as the top position in a box, the box is formatted with a dotted-line box unless you change this default in the current chart style. In addition, an indirect box has a dotted connecting line to the supervisor box above it. Indicating that one person reports to more than one manager is accomplished with multiple records and use of position types. One box must be designated position type "E" for Employee. Other boxes must be designated position type "I" for Indirect Report. (Indirect Reports are not counted for head count purposes. Indirect Report boxes are displayed with dotted lines around the box, as well as the lines to the box.) When building from data, you need multiple employee records — one for each manager (see sample of data below). If you are building from data the records should look like the following: **ParentBoxID BoxID Box Title Record Type ID Last Name First Name** Manager1 1234 xxx E Smith Carol Manager2 1234a xxx I Smith Carol Manager 3 1234b xxx I Smith Carol
C	**Contractor**	A contractor record type represents a person who is a contractor within an org box. Contractor record types are different from other position type records. Contractors are always displayed after managers and employees within an org box. Contractor names are formatted separately from other position types. Contractors are not counted in the head count with the default settings. You can override the default. When there is more than one contractor under a job title within a box, the names are defaulted to sort alphabetically by last name.
PR	**Partner**	A partner record type represents a person in a partner box type and denotes a side-by-side relationship. A partner box is located on the same level and to the right of the box to which the partner is aligned.
B	**Box**	A box record type reports to another record and may have records reporting to it. A box record type can be used to create a report-to box that does not contain a person or job title, for instance a department or division name. You cannot add persons to a box with B record type.
BA	**Assistant box**	An assistant box record type can be used to indicate there are assistants for the report-to box, but names and job titles are not stored in the box, for instance a department or division name that has an assistant. You cannot add persons to a box with BA record type.
SF	**Staff function**	A staff function record type represents a person very much like an assistant, or a cost center displayed in a staff function box. The staff function normally has boxes reporting to it in the chart and is positioned opposite an assistant box on the reporting line. Staff function record types have a Priority of 0, and are placed in their own box.
SC	**Succession candidate**	A succession candidate record type represents a person who is a candidate for a specific position currently being held by someone else. Succession candidate record types have a Priority of 1, and are typically placed in a normal box type with other candidates, as well as the current person holding the position they may inherit.

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Boxes and Position Types

Each **box type** has a designated position within the chart in relation to other box types. By placing position types in specific box types it ensures that the position type appears in its correct hierarchal position in the org chart.

Normal Box	Assistant Box	Partner Box	Staff Box
Employee	Assistant	Partner	Staff Function
Manager			
Contractor			
Indirect report			
Succession Candidate			

An open position type will occupy the same box type as the original position.

Creating and Using a Semantic Dictionary for Intelligent Searches

You can add values associated with specific fields in order to expedite searching on box and job titles. The *Semantic Dictionary Editor* enables you to create associations between the titles and any value you enter for it.

1. Select **Options** from the Main menu, **Search options**, and then **Semantic Dictionary**.

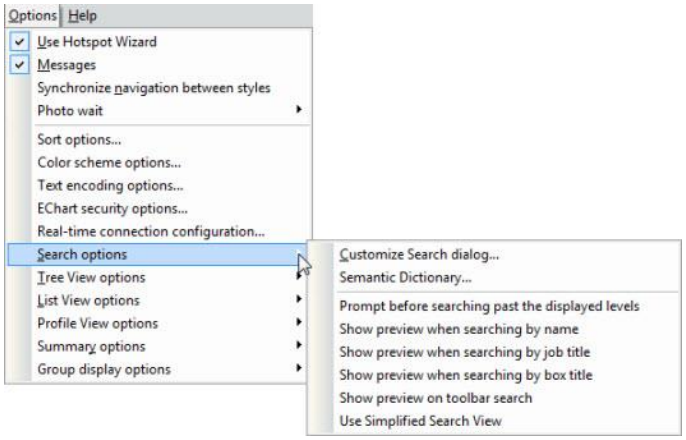


Figure 46.

The *Semantic Dictionary Editor* dialog opens.

The Semantic Dictionary provides "nodes" for you to work with.

- The first node is the OrgPublisher field label, such as **Job Title** and **Box Title** (both these fields are default entries in the dictionary). You can enter as many field labels as you need.

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- The second node is the field name you use in the chart. For instance, your label may be Job Title, but the name is Administrative Assistant or Sales Associate.

2. Select the node you want to add values to. Two buttons appear to the right, a plus, to add a value, and a minus, to delete a value.
3. Click the Plus button to add a value.

   A **Map** node appears with a **Value** record. **Map** represents the action of mapping the term you are about to add to the node you have selected. **Value** represents the term you are adding that, when searched for, will find the original node, and all other mapped terms, in the search results.



Figure 47.

4. Select **Value** and type the word, phrase, or partial word you want to associate with the select title. Press **Enter** to accept the new value.
5. If additional search criteria exist, highlight one of those records and click the Plus button. The Value record displays below it.

   Type the word, partial word, or phrase you want to associate with the selected job title. Press **Enter**.



Figure 48.

6. Click the Plus button at the Map level to add another value to the selected title. Or, click the Plus button at the Value level if you want to add an even deeper layer of search by mapping another term to the new term.
7. Repeat steps 2-5 to add values to other titles.
8. To delete a value, select it and click the Minus button.
9. Click **OK** to accept your entries and close the dialog.

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When using the *Search View* to search on box or job titles, end users type any of the entries associated with a job title, the search results pane displays all possible matches.

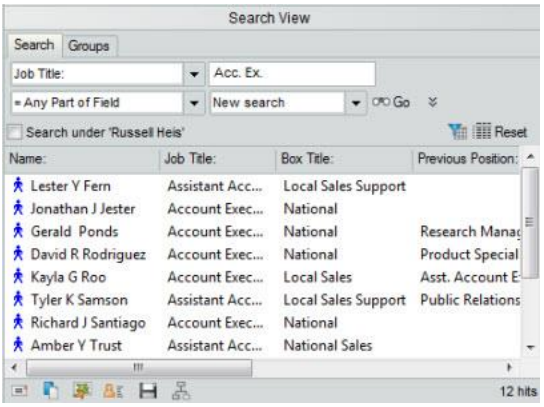


Figure 49.

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Create Charts Overview

After your data has been prepared you're ready to create your chart. You can create a chart automatically or manually. This section also provides information about OrgPublisher Chart elements, menus, and toolbars.

Topics Pertaining to this Section	
Getting Started with OrgPublisher	Position Types
Automatic Charts	Hotspot Links
Manual Charts	Styles
Custom Fields	Using the Format Dialog

Getting Started with OrgPublisher

By the time you reach this point the following activities should have occurred:

- OrgPublisher has been installed on your computer.
- Your company's human resource data is in a location that you can access.

-or-

- You have access to data from which you will manually create a chart.

To create a new chart or open an existing chart:

1. Open OrgPublisher.

   OrgPublisher displays a blank chart and the *OrgPublisher* dialog.

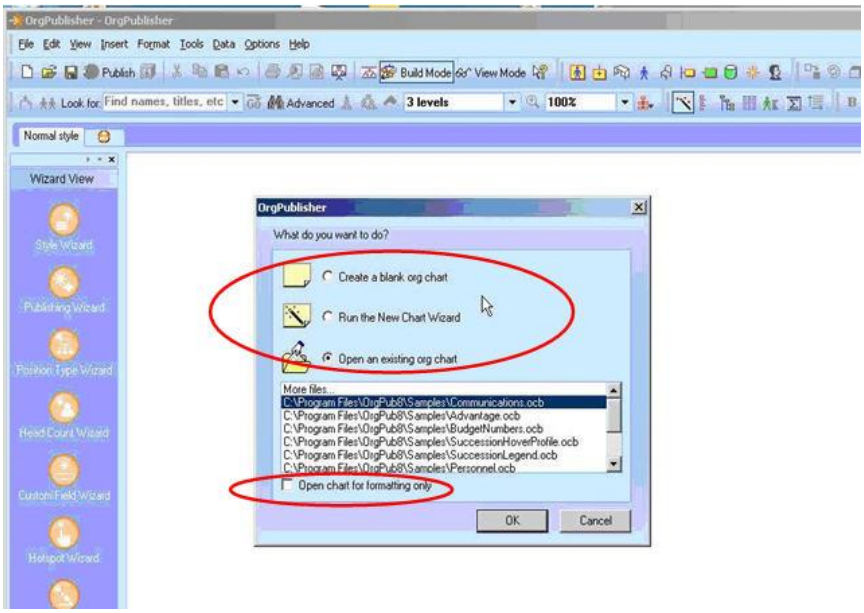


Figure 50.

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The Create a blank org chart option provides a blank org chart to which you can add boxes, enter the employee information into the boxes, and apply formatting.

The Run the New Chart Wizard option provides interactive screens to walk you through the process of creating a new chart, either manually or automatically.

The Open an existing org chart option is preselected by OrgPublisher, and a list of existing charts is provided from which you can choose.

Choosing the **Open chart for formatting only** option opens an existing chart for formatting changes only. No data changes can be made to a chart opened with this option.

2. Select the option you want then click **OK**.

What You Need to Know

When creating a chart

There are two ways you can build organizational charts in OrgPublisher:

Automatically

By connecting directly to a data source. You will need to know the path to that data. OrgPublisher provides the ability to access data from multiple locations. Your IT department should be able to provide you with this information.

Manually

By placing boxes on a chart and entering employee information into the boxes.

When building from data

You should have an understanding of how your company's reporting relationships work, the layout of your company's reporting relationships, and other HR data so that you can properly map the data for OrgPublisher. It is also useful if you have experience in:

- Querying a database.
- Writing VBA scripts (for automating charting processes).
- Adding and extracting data from a database.
- Operating a Microsoft Windows spreadsheet application.

You should also familiarize yourself with the system requirements and parameters.

Topics Pertaining to this Section	
Linking to your Data Source	Identifying and Using Pointers
Chart Window	Identifying Invalid Comma-separated File Format
Chart Parameters	Build and View Modes
Drilling Through Chart Levels	Views

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Linking to Your Data Source

You must know how to link to your data source to create your chart, manage your data, and resolve reporting relationship problems. Your system administrator may need to provide some of the information required to connect to your database. To share a database connection file with another user, you must use a file **DSN** on a shared network path when you save the ODB file.

You can connect to an ODBC-compliant database and extract data for your organizational chart. You can also connect to, or create, a text file to use as input for creating your chart.

Use the New Chart Wizard to select the data source, tables, etc. These selections form an **SQL** statement that is used to extract data from your database. You can also write your own **SQL** statement. For query samples, refer to the Downloads section of the web site.

Once you have saved the file with your connection, you can reconnect to the same database by opening the chart's ODB file.

Chart Window

When you start OrgPublisher and open a chart, the OrgPublisher window opens. It contains a main menu and several toolbars, which you can turn off if you choose. The Style bar which displays the current chart style at the top, the Status bar which displays the levels shown and the head count for those levels at the bottom of the window, are always visible.

The main window section, called the *Chart View*, contains the chart components, such as data and photos, arranged in boxes. The sample below includes telephone numbers, departments and head counts. The *Chart View* is always displayed, regardless of how many other views you select.

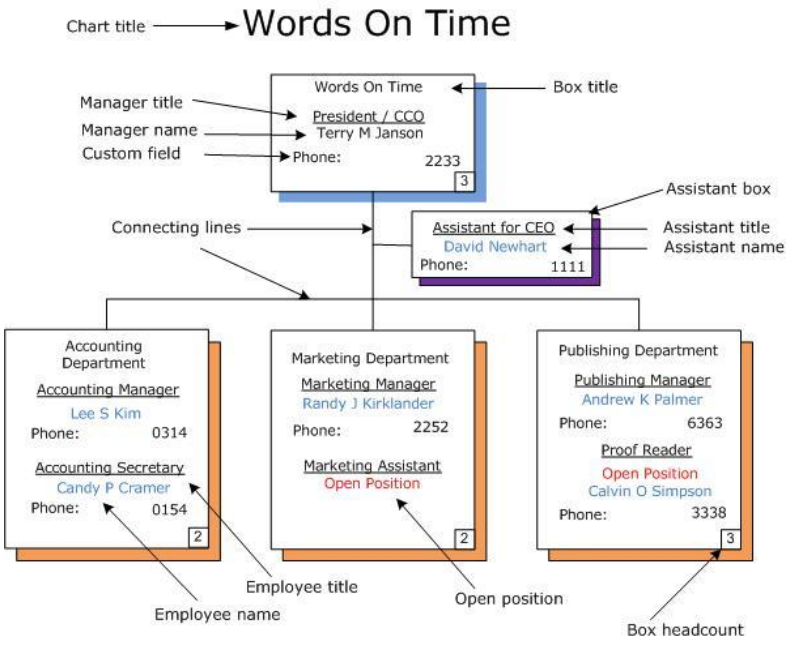


Figure 51.

You can move views, except for the *Chart View*, to display anywhere in your chart.

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Drilling Through Chart Levels

If you want to display only a few levels within your chart, you can use the OrgPublisher Drill-up/Drill-down  feature. You can set the number of levels that are displayed from the *Custom levels* dialog on the toolbar or from the Style Wizard while creating a style for your chart. This feature is available in both the OrgPublisher application and in a published chart in a browser.

Drill-up  and drill-down  buttons are arrows that are placed above or beneath boxes to indicate there are chart levels above or below them. Unless you change it, you move up or down through the chart the number of levels shown in the *Custom Levels* dialog on the toolbar. Changing the number of levels to drill up is useful when used with the Set Top of Chart  feature. You can customize drill buttons to make your charts more cosmetically appealing or to better match your corporate document style. You must show a minimum of two custom levels.

Note: Drilling through a real-time chart automatically updates the chart.

Identifying Invalid Comma-separated File Format

When building from data or using API function definitions, found in the OrgPublisher Software Development Kit (OPSDK):

- Ensure that fields that contain a comma, such as last name, are enclosed in quotes.

  Example:

  Incorrect: ,Smith, Jr.,

  Correct: ,"Smith, Jr.",

- Ensure that fields do not contain any quote characters.

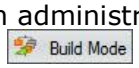
  Example:

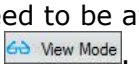
  Incorrect: ,"Mc"Donald",

  Correct: ,"Mc'Donald",

- Ensure that there are no blank records at the end of the file. Word processors and spreadsheets may inadvertently leave blank lines at the end of the file. The last record in the file should be followed by the end of file marker.
- Ensure that no single field is over 2000 characters in length.
- Ensure that there are no less than 10 comma-separated fields in each input record.

Build and View Modes

Build Mode vs View Mode - If you are an administrator, you'll need to be aware of this. OrgPublisher operates in either *Build Mode* 

or *View Mode* 

.

You use *Build Mode* to create, edit, and reorganize data. You use *View Mode* to format and view charts as they will be seen by your users when published.

When building charts from data, remember that any editing of data or hierarchical structure made using *Build Mode* will be lost when your chart is refreshed.

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Build and View Modes Active Features

OrgPublisher operates in either *Build Mode* or *View Mode*. You use *Build Mode* to create, edit, reorganize, and format charts. You use *View Mode* to format and view charts as they will be seen by your users when published.

You cannot hide chart components while in *Build Mode*, but you can switch to *View Mode* at any time. If you try to hide components while in *Build Mode*, OrgPublisher automatically switches to *View Mode*.

Note: Build Mode features a Compact version so that you can view more of your chart while you work on it. Click the Compact Build Mode button and OrgPublisher hides everything in the chart boxes except the names. This way, you can drag and drop boxes in the Build Mode without all the custom fields, job, or box titles taking up screen space.

Planning charts are always in Build Mode, and do not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the Advanced Box Layout settings.

The Compact Build Mode is not available to save as a style, but you can create a similar chart style by hiding all your chart elements except the employee names.

Views

The user interface within OrgPublisher displays smaller windows called views.

Chart View

The *Chart View* is the main window and contains the chart components arranged in boxes, as well as any enabled toolbars and views.

9 Box Matrix View

The *9 Box Matrix View*  , providing comparative sets of data for select criteria, allows you to compile the top performers and high potential employees in preparation for succession planning. You can print this view or show where people from the *Profile View* fit in this view.

Hover Profile View

The *Hover Profile View* allows users to quickly view key custom fields just by letting the cursor hover over a box component. The *Hover Profile,* if enabled, opens when you hover the mouse button over a component in the chart box.

Tree View

The *Tree View*  arranges data hierarchy in an outline format. The *Tree View*, not available in published thin client ECharts, arranges chart components in an outline format. You can also locate and display any person or position in the chart by clicking on it in the *Tree View*. You can print this view.

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List View

The *List View*  can be used as a telephone directory or general field information by employee record, and includes a *Search View* pane. You can copy and print this view.

Search View

The *Search View* is a separate pane inside the *List View*. It contains options to search for select criteria, save the results as groups, and associate icons with the groups. You can also copy, email, include in *Profile View*, and export data in this view.

You can use a group filter  in your searches if you want OrgPublisher to search only the selected group and only display those matching records.

The **Groups** tab displays the existing groups in the org chart. It enables you to create a new group description, delete a group, or edit an existing group description. The E-mail to group feature is also available in this tab if the chart contains custom fields assigned to the E-mail type.

The *Search View* also provides a **My groups** tab when the chart is published. This tab is viewable only in the published chart. Once your org chart is published with the *Search View*, end users can search for and save their own groups, which are displayed in the **My groups** tab in the published chart.

Profile View

The *Profile View*  can provide employee, job, or box profiles containing information you may not want to display in the chart box. Side-by-side Profiles can be used to build groups in conjunction with the 9 Box Matrix or search results.

Filter View

The *Filter View* lists all groups used in the current style, as well as any group categories used to identify group types. The Filter View is anchored to the right side of the OrgPublisher window and closes as soon as you have selected a group to view.

Summary View

The *Summary View*  provides totals and calculated summary totals by position type and group. Workforce Analysis Graphs, part of the *Summary View*, allow you to display your summary data in a visual way. You can copy, print, and export the List View. You can also copy and print the Workforce Analysis graphs.

Styles View

The *Styles View*  , if enabled, displays a list of available styles within the current chart. You can modify this view by right-clicking on the Styles bar.

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Click the Styles View button  in the toolbar to display this view or select View from the menu bar, then Style View from the pull-down menu. The *Styles View* defaults to the left side of the window, but you can drag it to another location.

Tabbed views are available for the *Profile View*, *Style View*, and *Hover Profile*.

Moving and Docking Views

Views can be docked in one place or you can float them in the chart. You can also remove or size views. When creating styles in OrgPublisher, you can select which views should become part of that style. The location and size of the view at publishing time determines what the end user sees in the published chart.

Docking a View

1. Place the mouse pointer on the docking bar portion of the view.
2. Holding the mouse button down, drag the view to the new location.
3. Release the mouse button when you have the view where you want it.
4. You can float the view or dock it on the top, bottom, left, or right of the screen. An outline of the view displays as you are dragging it.

Sizing a View

1. Place the mouse pointer on the edge of the view.
2. Drag to change the size of the view.

Removing a View

To remove a view from the OrgPublisher window or from a style, you can either:

- Click on the close button (X).
- Click on the view button in the Views toolbar.

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Automatic Charts

OrgPublisher provides a wizard to help you begin creating a new chart. The *New Chart Wizard* can also launch the Style Wizard to help you create your first style.

Topics Pertaining to this Section	
Running the New Chart Wizard	Creating an Org Chart from Multiple Data Sources
Creating an Org Chart from an ODBC Database	Choosing Standard or Custom Field Order
Creating an Org Chart from an XML File	Selecting a Database Table, View, or Query
Creating an Org Chart from a Text File	Mapping to Multiple Field Types
Creating an Org Chart a UNICODE File	

Running the New Chart Wizard

OrgPublisher provides a wizard to help you begin creating a new chart. The *New Chart Wizard* can also launch the Style Wizard to help you create your first style.

Real-time publishing is not available when building a chart from multiple data sources.

1. Open OrgPublisher and select Run the **New Chart Wizard** or click the New button in the toolbar.
2. To create a new chart using the Prebuilt Reports feature, click here. Select **Organizational chart** then click **Next**.

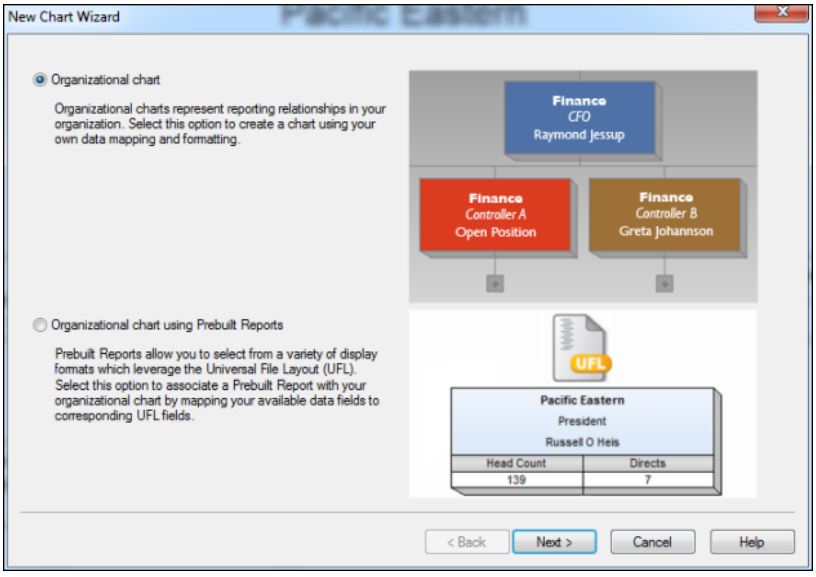

New Chart Wizard
Organizational chart
Organizational charts represent reporting relationships in your organization. Select this option to create a chart using your own data mapping and formatting.
Finance
CFO
Raymond Jessup
Finance
Controller A
Open Position
Finance
Controller B
Greta Johannson
Organizational chart using Prebuilt Reports
Prebuilt Reports allow you to select from a variety of display formats which leverage the Universal File Layout (UFL). Select this option to associate a Prebuilt Report with your organizational chart by mapping your available data fields to corresponding UFL fields.
UFL
Pacific Eastern
President
Russell O Heis
Head Count
139
Directs
7
< Back
Next >
Cancel
Help

Figure 52.

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3. In the *Select a data source* dialog, select a source for your data then click **Next**.



Figure 53.

Note: If you do not know what your data source type is, see your OrgPublisher or IT administrator. The multiple data sources option is considered an advanced org chart option and is not part of this section.

If you selected:

ODBC database, go to the Creating a Chart From an ODBC Database procedure.

XML file, go to the Creating a Chart From an XML File procedure.

Text file, go to the Creating a Chart From a Text File procedure.

Note: If you are connecting to a Microsoft Excel file, you must create a named range identifying where the data is located within the spreadsheet

Creating a Chart from an ODBC Database

1. In the *New Chart Wizard Select a data source* dialog, select **ODBC database** then click **Next**.

   The next dialog box allows you to specify the **ODBC Data Source Name (DSN)**.

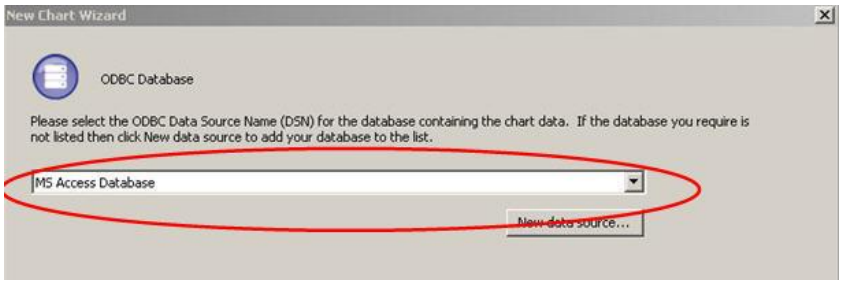

New Chart Wizard
ODBC Database
Please select the ODBC Data Source Name (DSN) for the database containing the chart data. If the database you require is not listed then click New data source to add your database to the list.
MS Access Database
New data source...

Figure 54.

2. In the *ODBC Database* dialog, click the down arrow and select the type of database containing your chart data. Click **Next**.

   -or-

   If your data source is not listed, click **New data source** and follow the instructions in the *Select Data Source* dialog.

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The *Select Database* dialog box opens.

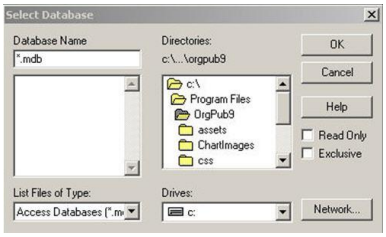


Figure 55.

3. Indicate the path and filename of the database containing your data then click **OK**.

   The next dialog allows you to select the database table, view, or query that contains the data for your chart.

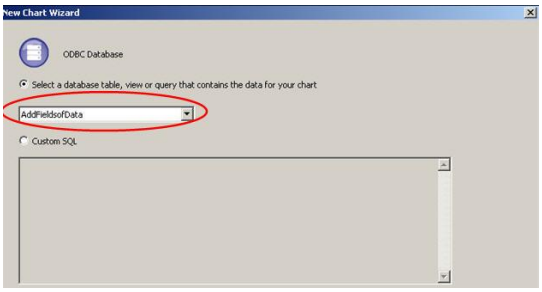

New Chart Wizard
ODBC Database
Select a database table, view or query that contains the data for your chart
AddFieldsofData
Custom SQL

Figure 56.

4. Click the **Select a database table, view or query that contains the data for your chart** option. Click the down arrow and, from the options list, select the table containing the data from which you want to build your chart. Click **Next**.

   Note: The Custom SQL option is addressed in advanced procedures.

   The *Data preview* dialog opens, and the first 100 records are shown.

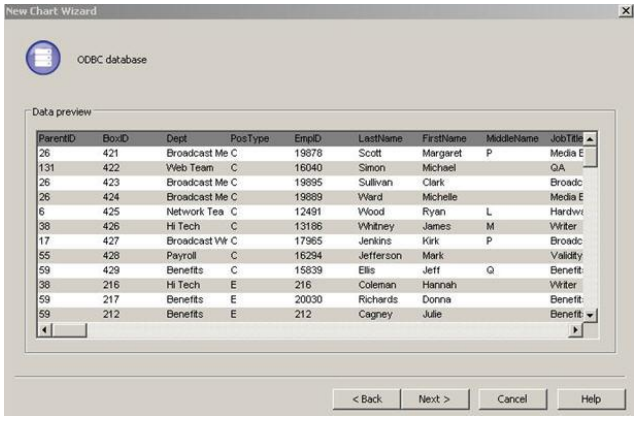

New Chart Wizard
ODBC database
Data preview
ParentID BoxID Dept PosType EmplD LastName FirstName MiddleName JobTitle
26 421 Broadcast Me C 19878 Scott Margaret P Media E
131 422 Web Team C 16040 Simon Michael QA
26 423 Broadcast Me C 19895 Sullivan Clark Broadc
26 424 Broadcast Me C 19889 Ward Michelle Media E
6 425 Network Tea C 12491 Wood Ryan L Hardwi
38 426 Hi Tech C 13186 Whitney James M Writer
17 427 Broadcast Wr C 17965 Jenkins Kirk P Broadc
55 428 Payroll C 16294 Jefferson Mark Validity
59 429 Benefits C 15839 Ellis Jeff Q Benefit
38 216 Hi Tech E 216 Coleman Hannah Writer
59 217 Benefits E 20030 Richards Donna Benefit
59 212 Benefits E 212 Cagney Julie Benefit
< Back
Next >
Cancel
Help

Figure 57.

5. Review the data to determine that it is the data you want, and then click **Next**.

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Note: If the data shown is incorrect, click **Back** to connect to a different database.

The next option allows you to accept the standard OrgPublisher field order or specify a custom order.

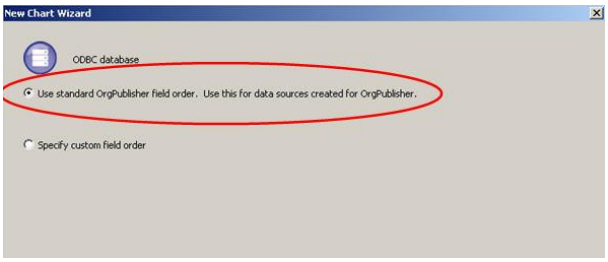

New Chart Wizard
ODBC database
Use standard OrgPublisher field order. Use this for data sources created for OrgPublisher.
Specify custom field order

Figure 58.

6. Select the appropriate option for your field order. The default selection is **Use standard OrgPublisher field order**. If the table, view, or query selected is not laid out in the field noted in the Input File Layout, see the Specifying a Custom Field Order procedure. This provides the mapping option. Click **Next**.

   When you select the default field order, OrgPublisher displays the following dialog box.

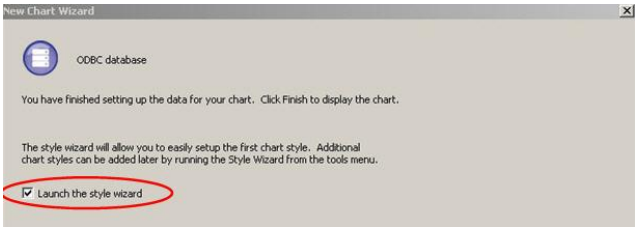

New Chart Wizard
ODBC database
You have finished setting up the data for your chart. Click Finish to display the chart.
The style wizard will allow you to easily setup the first chart style. Additional chart styles can be added later by running the Style Wizard from the tools menu.
Launch the style wizard

Figure 59.

7. If you do not want to **Launch the style wizard**, clear that check box. Click **Finish**.

   OrgPublisher displays your org chart.

Creating an Org Chart from an XML File

The *New Chart Wizard* enables you to create a chart from a single source, such as text, XML, or ODBC. You can also create a succession planning chart, see Mapping Succession Planning Fields for additional information.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the OrgPublisher dialog. You can also select **File** from the Main menu then **New** from the pull-down menu, or click the New button in the toolbar. The *New Chart Wizard* opens.
2. Select the **XML file** button and click **Next**.
3. Type or **Browse** to the chart XML file. Click **Next**.
4. The *Data Preview* dialog lets you verify that you have the right source and that your records contain the appropriate data. See the Specifying a Custom Field Order procedure for additional information. Click **Next**.

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5. You can accept the default in the last dialog to **Launch the style wizard** to format your chart, or you can clear the check box and click **Finish** to open your chart.

Creating an Org Chart from a Text File

The *New Chart Wizard* also enables you to create a chart from a single source, such as text, XML, or ODBC.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the OrgPublisher dialog. You can also select **File** from the Main menu then **New**, or click the New  button in the toolbar. The *New Chart Wizard* opens.
2. Select the **Text file** button and click **Next**.
3. Type or **Browse** to the **Chart Text File**. Click **Next**.
4. The *Data preview* dialog lets you verify that you have the right source and that your records contain the appropriate data. If your data file includes field names, select the **First row contains column names** check box. OrgPublisher then removes the **Field number** column headings. Click **Next**.
5. In the next dialog, select the **Use standard OrgPublisher field order** radio button if your database was built for OrgPublisher. Or, select the **Specify custom field order** radio button if you want to sequence your custom fields in a specific order. Click **Next**. If you chose to **Use standard OrgPublisher field order** in the previous step, proceed to Step 7.

   If you chose to **Specify custom field order**, the *Data preview* dialog enables you to map your field names to the OrgPublisher input layout.

   Note: When bringing data into OrgPublisher using ODBC or Microsoft excel data sources, the first row is assumed to be column headings. You are advised to select the Specify custom field order option, as noted above, and manually map your data to the correct file layout.
6. Click the pull-down arrow above the field you want to map, and select the appropriate OrgPublisher record name from the pull-down list. The default option is **Do not import** for those fields you don't have to map. For instance, if your database contains fields identified as **ParentID** or **BoxID**, these fields will automatically map to the standard OrgPublisher record input field.

   Other mapping options in the list include **Custom Field**, **Parent Box ID**, **Box ID**, **Person ID**, **Position Sequence**, **Level Number**, etc. Duplicate usage of a field type is limited to custom fields. You can also click **Apply Standard Mapping** if you choose not to map fields manually.

   If you are creating a succession planning chart, see Mapping Succession Planning Fields for additional information.

   You will most often use this dialog to identify your custom fields. When you finish mapping, click **Next**.
7. You can accept the default in the last dialog to **Launch the style wizard** to format your chart, or you can clear the check box and click **Finish** to open your chart.

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Creating an Org Chart from a UNICODE File

OrgPublisher can read and write UNICODE files to support internationalized data from ERP and HR systems. Files are converted to and from UNICODE as they are serialized. OrgPublisher correctly displays characters from any region but does not display characters from multiple regions simultaneously.

1. Select **Options** from the Main menu then **Text encoding options** from the drop-down list.
2. The setting in the *Text Input File Encoding Options* dialog is stored in the value **Encoding** under the registry key **HKCU/Software/Aquire/OrgPublisher/Settings**. This setting is global to OrgPublisher for the current user.
3. You can change the default **Automatically detect encoding by reading the Byte Order Mark (recommended)** by selecting one of the alternate radio buttons in the Input file encoding method section of the dialog.

   Additional options include:

   - Open all input files as ANSI text
   - Open all input files as Unicode UCS-2 little endian
   - Open all input files as Unicode UCS-2 big endian
   - Open all input files as UTF-8
4. Click **OK** to close the dialog.

> **Note:** The first option (Automatically detect encoding by reading Byte order Mark) does not work unless the UNICODE input files contain a Byte Order Mark (BOM). In that case, select an alternate option based on your input file type.

Creating an Org Chart from Multiple Data Sources

The New Chart Wizard also enables you to create a chart from a single source, such as text, XML, or ODBC.

> **Note:** Real-time publishing is not available when creating a chart from multiple data sources.

1. Select **File** from the Main menu then **New** from the pull-down menu. You can also click the New  button in the toolbar. The *New Chart Wizard* opens.
2. Select the **Organizational chart** radio button, and click **Next**. The *Select a data source* dialog opens.
3. Select the **Multiple Data Sources** button, and click **Next**. The *Multiple data sources* dialog opens.
4. Click the appropriate button to **Select a Primary Data Source**. Click **Next**.
5. Follow the prompts for the data source you select, ODBC database, XML file, or Text file.

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Note: Web Administration supports opening multiple data base charts (OCB, CSV), as long as those files exist in the **SourceCharts** folder. Web Administration, however, does not support creating multiple data source charts from these file types, neither does it support editing the text file charts using the *Data sources* dialog.

6. The next dialog asks you to either accept the default name, **Primary data source**, or type a "nickname" for this data source. Click **Next**.
7. The next dialog verifies that you want to use another data source. Select the **Yes** radio button and click **Next**.
8. The *Multiple data sources* dialog allows you to identify what the additional data source contains.

   If you select **Additional boxes, positions, and persons**, you can also select the **All new positions have the following position type** check box and select the corresponding position type.

   If you select **Additional fields for existing records**, choose the corresponding data element from the **Link to** pull-down list.

   Click **Next**.
9. In the next dialog, click **Select an additional data source** then click **Next**.
10. Follow the wizard prompts to add the additional data source, **ODBC database**, **XML file**, or **Text file**. Click **Next**.
11. Either accept the default name, **Secondary data source 1**, or type a "nickname" for the additional data source. Click **Next**.
12. You can again access another data source by selecting **Yes**, and repeating Steps 4 - 11. Select **No** to complete the wizard.
13. You can accept the default in the last dialog to **Launch the style wizard** to format your chart, or you can clear the check box and click **Finish** to open your chart.

Note: By design, only the last data source in the list can be deleted.

Custom fields and associated data are NOT deleted from the chart when you delete a data source. These custom fields, or just the custom field data, must be deleted manually using the Custom Field Properties dialog.

Choosing Standard or Custom Field Order

When creating a new chart from data, you must choose between a standard field or map to a custom field order.

1. Follow the New Chart Wizard dialogs, selecting the data source and database table or query. Click **Next** in the *Data preview* dialog.
2. The next dialog defaults to the **Use standard OrgPublisher field order** radio button. As noted in this option, you should accept the default only if your database was created with the OrgPublisher Input File Layout in mind. This layout provides information in a specific order, and relies on a person-to-person, position-to-position, or department-to-department relationship. Unique IDs are used for the parent box, individual employees,

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boxes, jobs, and more. If you accept this default selection click **Next** to finish the wizard.

If you are working with the Prebuilt Reports feature, your options display as **Use the standard Universal File Layout (UFL)** order and **Map data to the UFL field order**. See the Prebuilt Reports - Create a New Report procedure for additional information.

3. If your database was not designed to follow the OrgPublisher input file layout, select the Specify custom field order radio button. Click **Next** to map your field order to work with the OrgPublisher layout.
4. Follow the link in Step 3 to map your field order then complete the *New Chart Wizard*.

Data Preview

When creating a chart from data, OrgPublisher displays a *Data preview* dialog that allows you to scan the first 100 records to verify you've selected the correct table, view, or query.

If the extracted records are correct, click **Next** to complete the New Chart Wizard.

If the extracted records are wrong, click **Back** to select a new table, view, or query.

Head counts and head count roll-ups

- OrgPublisher provides two types of head counts in addition to a head count roll-up. These features count position types that have the Count set to Yes. Head counts are different from head count roll-ups, which are based on a counted position type or total population for each manager, department, district, region, etc. You choose if and where you want head count roll-ups displayed in your chart.

  Total head count - The counted "filled" positions in an org chart, indirect reports are normally not counted.

  Total planned head count - The counted "filled" and "open" positions in an org chart, indirect reports are normally not counted.

  Head count Roll-up - A count of positions reporting to a specific manager or area within an org chart.

  Note: Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.

- Head counts are displayed in the Status bar at the bottom of the window. The starting point of a head count is always based on the point in the chart that is displayed. For example, if you have several departments within your organization that are higher in the hierarchy than the Development department, but only the Development department is displayed in the chart, the head counts shown in the Status bar are based on the counts in the Development department on down.
- Position types displayed in the *Summary View* in OrgPublisher Premier can be excluded from the total head count, but included as an individual position type head count. For example, you can exclude contractors from the total head count, but insert a separate head count for contractors.

  Note: In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.

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Selecting a Database Table, View, or Query

When creating a chart from ODBC, you must select the table, view or query to extract data from the database.

1. Follow the New Chart Wizard dialogs, selecting the **ODBC** option and navigating to your ODBC database.
2. The dialog that opens next depends on the type of database you select. For example, if you select an SQL database the next dialog may be a login screen for SQL.

   Click the drop-down arrow and select from a list of tables, views, or queries.

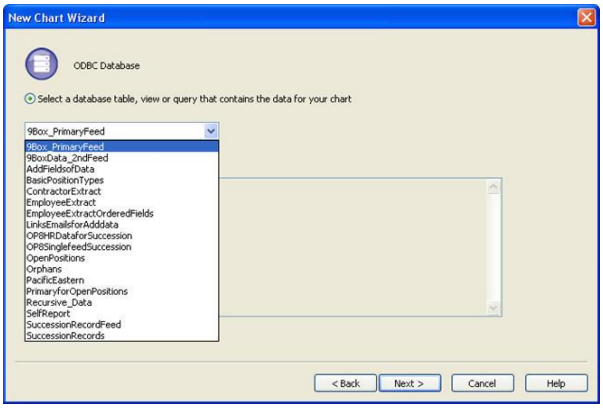


Figure 60.

   If your database does not already contain tables, views or queries you may have to write your own SQL statement.

3. If you want to write your own SQL statement select the **Custom SQL** radio button and type your query string.

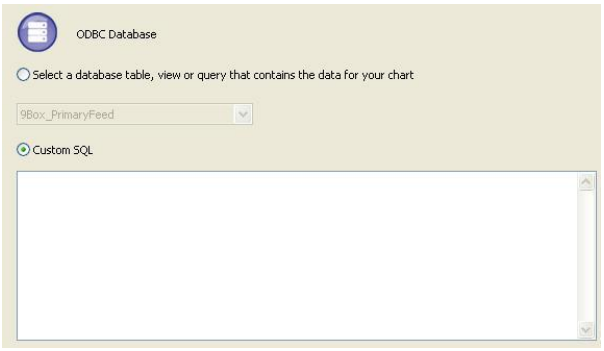


Figure 61.

4. You can later modify this statement in the chart by selecting **Data** from the menu then **Manage data sources** from the options list to open the *Data Source* dialog. Click **Connection Info** to open the *Database Connection* dialog.

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5. Click **Next** to continue the wizard and create your chart.

Note: If you are connecting to a Microsoft Excel file, you must create a named range identifying where the data is located within the spreadsheet.

Mapping to Multiple Field Types

1. You may need to map a single column of data as more than one field type when creating a chart from data. For instance, you have a column of data that contains the Employee Number. You want to use it as input field 5 (Person ID) as well as display the field in the chart as a custom field. Scroll down to the last field type option and click **Multiple**.

   The *Multiple Field Mapper* dialog opens.

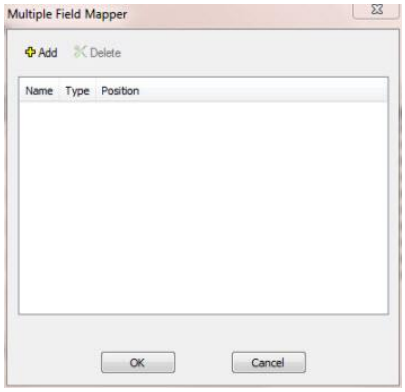


Figure 62.

2. Click **Add**. The Multiple Field Mapper inserts **Custom Field** as the first mapping type.
3. In the **Name** column, click **Custom Field** to display all the available options.

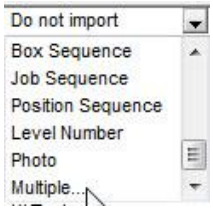


Figure 63.

4. Select the field type you want to apply.
5. Click **Add** to insert the second instance of the field.
6. Repeat Steps 3-5 if applicable.

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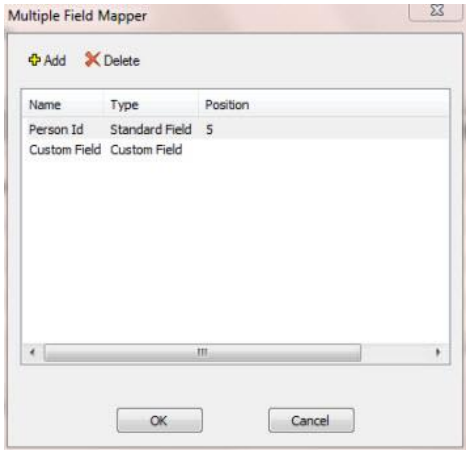


Figure 64.

7. Click **OK** when you have finished mapping the field. The mapped column is now labeled as **Multiple**.
8. When you have finished mapping your fields, click **Next** to continue with the New Chart Wizard.

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Manual Charts

Once you have inserted the first box into your chart, you can begin building your chart levels by inserting additional boxes.

You can also design the box and chart format, or you can apply a preformatted chart design provided by OrgPublisher.

> **Note:** Although this section provides information on manually editing a chart, remember that if you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.

Topics Pertaining to this Section	
Creating a Blank Org Chart	Inserting a Staff Function Box
Inserting the First Box and Person	Inserting Assistant Boxes
Inserting Chart Components	Inserting Open Positions
Inserting a Chart Title	Inserting Partner Boxes
Inserting a Custom Field for a Single Position Type	Inserting People
Inserting a Custom Field for All Position Types	Making Several Insertions for the Same Position Type
Inserting a Person/Job Box	

Creating a Blank Org Chart

Creating a blank org chart is the first step to building a chart manually. You insert each box then populate each box with the employee information. The first box must contain a person and a job.

To insert these two components at the same time, select the Person/Job box  button from the Insert Toolbar. (See Menu Bars Overview for the purpose and behavior of each button.)

1. Open OrgPublisher.

   OrgPublisher displays a blank chart and the *OrgPublisher* dialog.

2. Select the **Create a blank org chart** radio button.

   Click **OK**.

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OrgPublisher opens in Build Mode with the *Wizard View* displayed on the left.

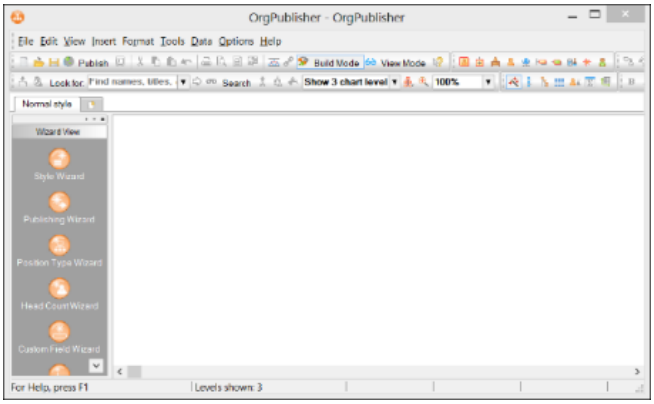


Figure 65.

3. Begin building your chart, using the insert components toolbar buttons.

Inserting the First Box and Person in a Chart

When you manually create an org chart, you start with a blank chart, and then insert each box, enter all of the relevant information into each box, and then format the chart.

1. From the Main menu, select **Insert** then **Person in box** from the options list.



Figure 66.

You can also select the Insert Box containing a person button  in the Insert toolbar.

Click and release the mouse. Notice that the cursor, or pointer, has changed  .

2. Click inside the chart to place the box. The **Box title**, **Job title**, and **Name** fields appear inside the box.

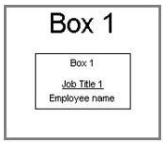


Figure 67.

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Because this is a new chart, the first box is placed at the top and middle of the new chart window.

3. Inside the box, click the **Employee name** text and replace the field name with the name of the employee. Click **Enter**.
4. Double-click the **Job Title 1** text. The *Rename Job Title* dialog opens.

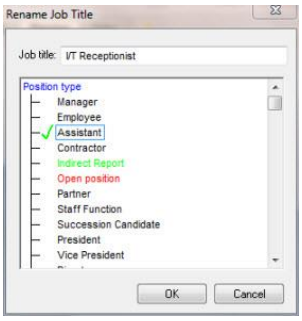


Figure 68.

5. Type the **Job title** and select the **Position type**. Click **OK**. The *Rename Box Title* dialog opens.

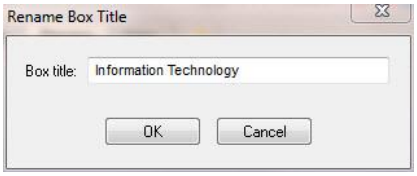


Figure 69.

6. Type the **Box title** then click **OK**. The new name appears inside the box and at the top of the chart. When you rename **Box 1** (inside the box), that name becomes the chart title. This is typically the name of your organization or a department name, but may be whatever works best for your chart. See the Formatting a Chart Title procedure for more information.

   Add additional boxes to your chart, using the Inserting Boxes in a Chart procedure. See the Box Button Descriptions topics to help identify appropriate buttons.

Inserting Chart Components

Buttons for chart components are contained on the Insert toolbar and listed in the **Insert** menu. You can insert these components manually or with the New Chart Wizard.

To insert chart components, you can do one of the following:

- Select the component from the Insert menu.
- Select the component using the shortcut keys. (To identify the shortcut keys, select the menu option and use the keys displayed next to the component name.)
- Select a button from the toolbar. (To identify a button, float the cursor over it. A description appears.)

You must be in Build Mode to create new charts and insert chart components.

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The first component you insert is a box. Boxes are containers for other chart components such as jobs, people, hotspots, custom fields, and open positions. Boxes must be inserted in the chart before other components can be added.

There are three types of boxes:

Normal 

Assistant 

Partner 

The box type you will probably use most frequently is the box that inserts a person, job and box  at the same time. Like the normal box type, this box is inserted beneath the box on which you drop it. The Insert Person/Job box inserts a normal box with prompts for box title, job title, and employee name by position type.

Unique formatting is assigned to the assistant box and partner box. Assistant boxes are inserted beneath and to the right of the higher-level box. Multiple assistant boxes alternate to the right and left of this box.

A partner box is inserted on the same level and to the right of the box on which it is dropped. In addition, you can use a Staff Function box which works similarly to an Assistant box but allows a full hierarchy beneath it. In order to use this special box type, you must first create a Staff Function Position type.

Inserting a Chart Title

When you insert the first box in a new chart, the text "Box 1" is automatically inserted and selected for you to add the box name and becomes the chart title. The text you type displays for both the box and the chart.

A planning chart ordinarily displays an existing chart title, which you can modify.

1. Right-click the chart title. Click to clear **Auto Title**. The text "Chart Title" appears.
2. Double-click the text and type the title of the chart. Press **Enter**.
3. Save the chart.

   -or-

   Double-click on an existing chart title and type a new title.

Inserting a Custom Field for a Single Position Type

You can insert a custom field for a single position type by dragging it from the Custom Field Properties dialog.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu.

   You can also click the Custom fields  button. The *Custom Field Properties* dialog opens.

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2. You can also use the Custom fields  button in the toolbar and move the mouse pointer to the place within an existing box where you want to insert the custom field. Click the mouse to add it.
3. Make sure the field **Drag and Drop for All Position Types** is not selected. Click **Close**.
4. If the check box is selected, click on it to clear it then click **Apply**.
5. Position the cursor in the column to the left of the **Field label** of the custom field to be added. Click in the column and hold the mouse button down as you drag that custom field into the chart and place it within an existing box. Release the mouse button to add the custom field.
6. Double-click on the label for this custom field and type the new name, if applicable. Press **Enter**.
7. The new field displays in the dialog and the chart.
8. If you are adding the field data manually, double-click on the right-hand side of this field and type your data, for example a phone number. Press **Enter**.
9. If you want to format the new custom field, right-click on the field and select **Format** from the drop-down menu.

Inserting a Custom Field for all Position Types

You can insert a custom field for all position types by dragging it from the Custom Field Properties dialog.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields  button in the toolbar. The *Custom Field Properties* dialog opens.

   In addition, you can use the Insert Custom Field  button in the toolbar and move the mouse pointer to the place within an existing box where you want to insert the custom field. Click the mouse to add it.
2. Make sure the field **Drag and Drop for All Position Types** is selected. Click **Close**.
3. If the check box is not selected, select it and click **Apply**.
4. Position the cursor in the column to the left of the **Field label** of the custom field to be added to a position type. Click in the column and hold the mouse button down as you drag that custom field into the chart and place it within an existing box. Release the mouse button to add the custom field.
5. Double-click on the label for this custom field and type the new name, if applicable. Press **Enter**. The new field displays in the dialog and with every position type displayed in the chart.
6. Double-click on the right-hand side of each occurrence of this field and type your data, for example a phone number. Press **Enter**.
7. If you want to format the new custom field, right-click on the field and select **Format** from the drop-down menu.

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Inserting a Person/Job Box

When you create a chart, you must insert a box before you add any other components. This box must contain a person and a job. To insert these two components at the same time, select the Person/Job box button from the Insert toolbar.

You can also add the person and job chart components individually.

Inserting Additional Person/Job Boxes

Once you have inserted the first box into your chart, you can begin building your chart levels by adding additional boxes.

1. Click and release the Insert Person/Job Box  button.
2. Move the pointer over the box to which the new person/job box will be reporting and click to insert a person/job box beneath the box you selected.
3. Type over the **Box title**, **Job title**, and **Name** text with the appropriate for the person for the new box.

Inserting Multiple Person/Job Boxes

Once you have inserted your first box into your chart, you can add several boxes at once.

1. Press and hold the **Ctrl** key. Click and release the Insert Person/Job Box  button.
2. Still pressing the **Ctrl** key, move the pointer over each box under which you want to place a new box. Click the mouse once for each box you want to insert.
3. To insert the last box, release the **Ctrl** key and click the mouse over the last box under which the new box will be inserted.

Inserting a Staff Function Box

Unlike the process of inserting other chart components from the OrgPublisher toolbar, inserting a staff function box to an existing chart requires that you first create a staff function position type.

Note: Only Staff Function position types can reside in Staff Function boxes.

If you are working with an empty chart, the position type is already available in the Position Type Wizard. The actual box type does not contain special formatting by default, but you can format the box to your specifications.

1. Once the position type is created, you add a box with a person and job into the chart where you want to place the staff function.
2. Double-click on the name field to open the *Update Person* dialog and select the **Staff Function** position type.

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3. The staff function box title displays and the box may be repositioned. Double-click on **Staff Function** to change the box title. If you add reports to this box, a drill-down button displays and you must drill to view those reporting boxes.

Inserting Assistant Boxes

An assistant is a special type of box that is inserted below and to the right of a selected box. If you insert more than one assistant box, these boxes alternate from the right and then to the left of the reporting box. The text "Assistant Box" followed by the number of the box in the chart, is placed into the box as the box title.

Note: You can add reports to assistants in OrgPublisher, enabling you to show one level of reporting boxes under an Assistant Box.

Inserting and labeling an Assistant box

You can add one or more assistant boxes in your org chart. Multiple jobs and people can be placed in an assistant box.

1. Click and release the Insert Assistant button  on the Insert toolbar.
2. Move the mouse pointer over the box title or job under which the assistant box will be inserted. Click the mouse.
3. The assistant box is inserted below and to the right.
4. Type a title for the assistant box.

Inserting multiple Assistant boxes

Multiple assistant boxes can be placed under a box, and multiple jobs and people can be placed in an assistant box. Multiple assistant boxes inserted under the same box alternate from right to left.

1. Press and hold the **Ctrl** key. Click and release the Insert Assistant  button from the toolbar.
2. Still pressing the **Ctrl** key, move the pointer over each box title or job under which the assistant boxes will be inserted.
3. Click the mouse for each assistant you want to insert.
4. To insert the last assistant box, release the **Ctrl** key and click the mouse over the last box title or job.

Adding Boxes Under an Assistant Box

You can add reports to an assistant box type just as you can to other boxes in the chart. OrgPublisher displays these boxes vertically immediately below the assistant. Assistant boxes dropped on an assistant box display like normal boxes and will not contain the special assistant box formatting.

1. Click and release the Insert person/job button. (You can also use the Normal box  button.)

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2. Move the mouse pointer over the assistant box title or job. Click the mouse. The new box displays directly below the assistant box.

Note: You cannot add a Partner box to an Assistant box. If you have an Assistant box that has several reporting boxes, you should consider identifying that box as a Staff function box, rather than as an assistant. You can add several reporting boxes to an Assistant box, but since they are all displayed directly below the assistant, more than one or two boxes can make viewing your org chart difficult.

Only Staff Function position types can reside in a Staff Function box.

Inserting Boxes In a Chart

Boxes can be manually inserted into charts by either of the following two methods.

1. From the Main menu bar select **Insert**.

   The Insert toolbar also displays the box style buttons.



Figure 70.

   The Insert menu displays the options available.



Figure 71.

2. Select a box style, click the button, and then click inside the chart to place the box.

Inserting Normal Boxes

A normal box is one of three types of boxes that you can insert into your chart. It contains only the box title field and is always added directly below the box it reports to.

Inserting a single box

1. Click and release the Insert Box button  on the Insert toolbar.

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2. Move the mouse pointer over the box title under which the new box will be inserted. Click the mouse.
3. Type a title for the box.

Inserting multiple boxes

1. Press and hold the **Ctrl** key. Click and release the Insert Box  button in the toolbar.
2. Still pressing the **Ctrl** key, move the pointer over each box title or job under which the new boxes will be inserted.
3. Click the mouse for each box you want to insert.
4. To insert the last box, release the **Ctrl** key and click the mouse over the last box title or job.
5. Type the box titles for each box.

Inserting Open Positions

Open positions are positions in your organization that are not presently filled. Open positions retain the position type already assigned to the box, whether that is a manager, employee, etc. You can format and track open positions separately from the filled positions in your chart, as well as drop them on box titles, jobs, or other people. When you drop an open position on a box title, a new job title is automatically created for the open position.

Inserting an Open position

1. Click and release the Insert Open Position button  on the Insert toolbar.
2. Move the pointer over the box title, job, or person under which the open position will be inserted.
3. Click the mouse. The text "Open position" displays in the box.

Inserting multiple Open positions

1. Press and hold the **Ctrl** key. Click and release the Open Position  button on the toolbar.
2. Still holding the **Ctrl** key, move the pointer over each box title, job, or person under which the new person will be inserted. Click the mouse.
3. To insert the last person, release the **Ctrl** key and click the mouse over the last box title, job title or person.

Inserting Partner Boxes

OrgPublisher depicts the equal yet independent relationship of a business partner by inserting and connecting a partner box on the same level and to the right of the box on which it is dropped. Multiple jobs and people can be placed in a partner box. When you insert a partner, the box number is shown as the box title.

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Inserting and labeling a Partner

1. Click and release the Insert Partner button  on the Insert toolbar.
2. Move the mouse pointer over the box title or job by which the partner box will be inserted.
3. Click the mouse. The partner box is inserted to the right.
4. Type a title for the partner box.

Inserting multiple Partner boxes

1. Multiple partner boxes can be placed to the right of a box.
2. Press and hold the **Ctrl** key. Click and release the Insert Partner  button on the toolbar.
3. Still pressing the **Ctrl** key, move the pointer over each box title or job by which the Partner boxes will be inserted. Click the mouse for each partner box you want to insert.
4. To insert the last partner box, release the **Ctrl** key and click the mouse over the last box title or job.

Inserting People

People are the employees, managers, and other personnel in your chart. One person is automatically inserted whenever you place a job in a chart. Additional people can be dropped on box titles, jobs and other people. When you drop a person on a box title, a manager is created. If you already have an employee position type in that box, OrgPublisher displays both positions. When you drop a person on a job title, the person inherits the characteristics of the job.

When you drop a person on another person, the new person inherits the existing person's job title, and the new person's name is placed directly below the name of the existing person.

Inserting and naming a person

1. Click and release the Insert Person button  on the Insert toolbar.
2. Move the mouse pointer over the box title, job, or person under which the new person will be inserted. Click the mouse.
3. Type the name of the person.

Inserting multiple people

1. Press and hold the **Ctrl** key. Click and release the Insert Person  button on the toolbar.
2. Still pressing the **Ctrl** key, move the pointer over each box title, job, or other person under which the new person will be inserted.

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3. Click the mouse for each person you want to insert.
4. To insert the last person, release the **Ctrl** key and click the mouse over the last box title, job title or person.

Making Several Insertions for the Same Position Type

You can apply the format for the same position type to several boxes or jobs if you select a position type before you begin inserting boxes.

1. Select **Insert** from the Main menu then **Select position type** from the pull-down menu. The *Select Position Type for Insert* dialog opens.
2. Click on the position type you want to insert and clear the **Automatically assign Position Type** check box.
3. If you are inserting multiple boxes with this position type, or you want to make it the default position type when you insert a box, click the **Insert using this Position Type** check box.
4. To automatically assign a manager position type to the first inserted box and an employee position type on the box dropped on that position, click the **Automatically assign Position Type** check box.
5. If you do not select either check box, OrgPublisher prompts you for the position type when you insert a job or person into an empty box.
6. Click **OK**. The dialog closes.
7. Select the appropriate button from the toolbar and insert the box where you want it.

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General Chart Activities

Topics Pertaining to this Section	
Administering Enabled Languages	Showing or Hiding Chart Levels
Managing Data Sources	Showing or Hiding Fields in the Profile View
Setting the Default Template	Showing or Hiding Actual Head Count
Setting the Top of the Chart	Showing the Entire Chart
Showing or Hiding Chart Components	Using the Multi-level Peer Display

Administering Enabled Languages

If you need to publish charts in more than one language, you can do so with OrgPublisher Premier. Using the Administer Languages feature, you can select a language in which you have installed the OrgPublisher application.

All OrgPublisher dialogs and toolbars display in the translated language, **however, all of the data, custom fields, groups, and position types remain in the language in which you originally created the chart.**

Note: Each OrgPublisher application must be installed to a different folder directory, or the second instance overlays the first. For example, the English folder is OrgPub11 in Program Files. You should install the other languages in folder with names like OrgPub11FR (French language) or OrgPub11_SP (Spanish language).

1. Select **File** from the main menu, then **Administer Languages** from the options list. The *Administer Languages* dialog opens.

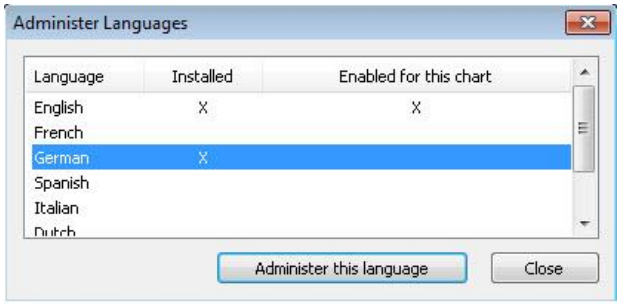


Figure 72.

2. The dialog displays all the languages available for OrgPublisher. An **X** in a language row indicates that OrgPublisher has been installed in that language on your machine or server.
3. Select the language you want to use and click **Administer this language**. If you currently have a chart open, you are prompted to save it.

   If a chart has not yet been published in the selected language, a message opens to verify that you want to create a new template and convert the OrgPublisher dialogs and toolbars to the selected language.

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Click **Yes**.

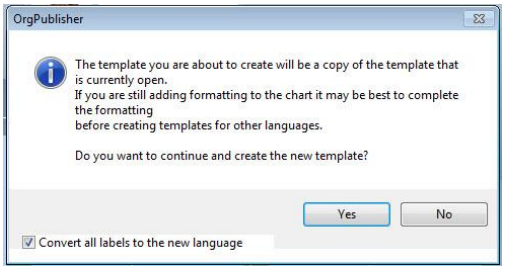

OrgPublisher
The template you are about to create will be a copy of the template that is currently open.
If you are still adding formatting to the chart it may be best to complete the formatting
before creating templates for other languages.
Do you want to continue and create the new template?
Yes
No
Convert all labels to the new language

Figure 73.

OrgPublisher closes the current chart and opens it again in the selected language.

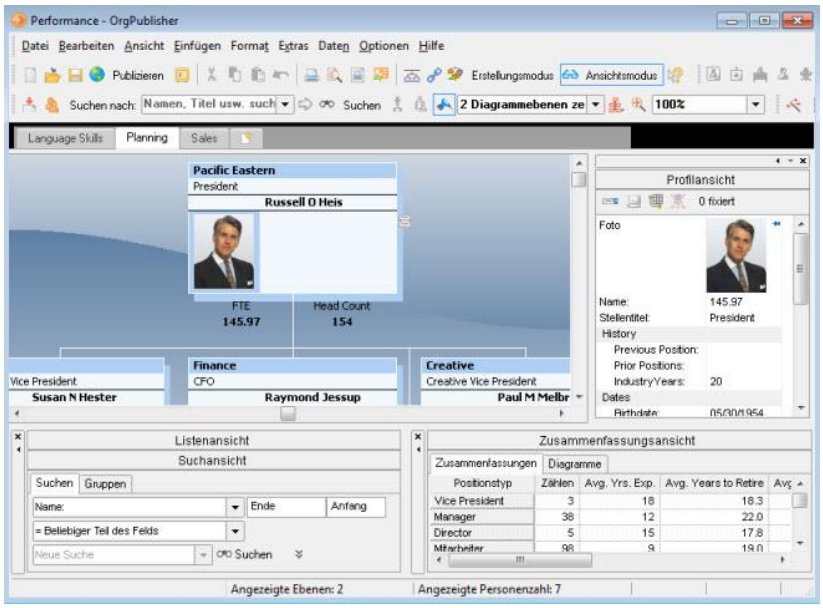


Figure 74.

4. Open the Custom Field Properties dialog and retype your custom field names in the selected language.

   When all custom fields have been translated, click **Apply** then **Close**.

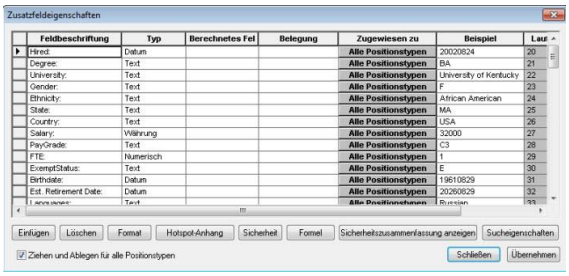


Figure 75.

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5. If applicable, retype the labels and values in each custom field in your chart so that they display in the appropriate language.
6. Save your chart, and then follow the appropriate publishing procedure.

Expanding or Collapsing Levels in Tree View

1. Select **Options** from the Main menu then **Tree View options**.
2. Select **Expand** or **Collapse** from the options list. **Expand** shows each level of information. **Collapse** shows only the top level, with plus (**+**) signs to indicate where additional levels are available. The Tree View immediately reflects your change.

Managing Data Sources

After you have created a chart from a multiple sources, text, XML, or ODBC, you can manage those sources through the **Data** menu.

Note: Web Administration supports opening multiple data base charts (OCB, CSV) as long as those files exist in the **SourceCharts** folder. Web Administration, however, does not support creating multiple data source charts from these file types, neither does it support editing the text file charts using the Data sources dialog.

- Click **Data** from the Main menu then **Manage data sources** from the options list. The *Data sources* dialog opens. This dialog displays a list of all databases used to create your chart. You can delete a data source, add a new data source, or modify the properties of a data source.

Add a Data Source

1. Click the New  button to add another data source to your chart. The New Chart Wizard opens at the *Additional data source* dialog.
2. Follow the wizard prompts to add the data source.
3. Click **Finish** to close the *New Chart Wizard* and return to the *Data sources* dialog.
4. Click **Close**.

   Your chart reflects the new data.

Delete a Data Source

Note: By design, only the last data source listed can be deleted.

Custom fields and associated data are NOT deleted from the chart when you delete a data source. These custom fields, or just the custom field data, must be deleted manually using the Custom Field Properties dialog.

1. Select the last data source displayed in the *Data Sources* dialog. Click the Delete  button to remove the data source from your chart.
2. A message asks you to verify that you want to delete the selected data source.

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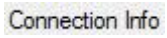
3. Click **Yes** to delete the source and return to the *Data sources* dialog. Click **Close**.

Modify a Data Source

1. Click the Properties  button to modify the data fields. The New Chart Wizard opens at the *Data preview* dialog.
2. Follow the wizard prompts to modify the data properties.
3. Click **Finish** to close the *New Chart Wizard* and return to the *Data sources* dialog.
4. Click **Close** when you are finished modifying the data sources.

   Your chart reflects the updates.

Review or Configure Connection Information

1. Click the Connection Info  button to review or configure your connection information. The *Database Connection* dialog opens.
2. To set the connection information, click **Configure**. The dialog fields are now enabled for editing.
3. Modify the connection information as needed and click **Verify**.
4. Click **OK** when you have finished configuring the database connection to close the dialog.

Setting the Default Template

A default template contains one or more styles and all of the formatting options within those styles.

1. Open the chart that contains the styles you want to use regularly, or create a style that includes colors, views, and data layouts that you want.
2. Select **File** from the Main menu then **Set Template as Default** from the pull-down menu. These styles will be active the next time you open a new chart.
3. To remove a default template, you can either rename or delete the file **Default.OTM** in the OrgPublisher directory.

> **Note:** There is no option to set a default template when using Web Administration (thin client publishing format) because setting the template on the server would set the same default template for all chart administrators' charts.

Setting the Top of the Chart

When you set the top of chart for the current style, the selected box and reporting boxes are shown in the *Chart View*. To set the top box in the chart style:

1. Click on the **Box title** you want to display as the top of your chart.
2. Select **View** from the Main menu then **Set Top of chart** from the pull-down menu.

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You can also use the Set top of chart  button in the toolbar.

OrgPublisher displays only the selected box and reporting boxes in both the *Chart View* and *Tree View* for the current style. Head counts in the Status bar are adjusted to reflect only the portions of the chart that are shown.

Setting up the OrgPublisher MIME Type

The OrgPublisher MIME type must be set up in order for Netscape users to view your chart on the company intranet.

Your intranet Web master or administrator must set up the following MIME type:

MIME Type	File extension
application/x-orgpublisher	.OCP

Showing or Hiding Chart Components

You can show or hide specific components in your chart such as an open position, assistants, partners, custom fields, hotspots, or your logo. You can show or hide fields using the *Show/Hide Chart Components* dialog, selecting options in wizards, or by using the right-click menu in views.

> **Note:** The *Show/Hide Components* dialog doesn't not apply to position types formatted using the *Advanced Box Layout Editor*.

All information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.

1. Select **View** from the Main menu then **Show/Hide chart components** from the pull-down menu. The *Show/Hide Chart Components* dialog opens at the **Components** tab. To modify levels displayed, see the Showing or Hiding Chart Levels procedure.

   You can also click on the Show/Hide Chart Components button  in the toolbar.

2. Select the **Style** from the drop-down list for which you want to show or hide components. A check mark next to a position type means it is displayed. An **X** means the position type is hidden.

   > **Note:** Keep in mind that, when you choose to show or hide fields, all information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.

3. Click the plus sign (**+**) to expand and view the components of a position type.
4. Click on a component to display (green check mark) or hide (red X) it.
5. Select the group displayed in the style from the drop-down list, if applicable. The default group is **Everyone**.
6. Click **Apply** to update the chart and keep the dialog open for further changes, or click **OK** to update the chart and close the dialog box.

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Note: In conditional formatting, the Search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.

Showing or Hiding Chart Levels

You can choose to show just a specified number of chart levels, or you can show all levels. You can also hide the lowest level of boxes. When you select a specified number of displayed levels in your chart, you create a custom level. The **Show Custom Levels** menu option displays chart levels using the currently selected top of chart, whether it is the actual top of the chart or an alternate specified with the **Set top of chart** command.

If you are working with a large chart, you may choose to display only a certain number of levels. You can also hide the lowest boxes in a chart.

1. Select **View** from the Main menu then **Show/Hide chart components** from the pull-down menu. The *Show/Hide Chart Components* dialog displays.

   You can also click on the Show/Hide Chart Components  button in the toolbar.
2. Click the **Levels** tab.
3. Select the **Style** you want to modify from the drop-down list.
4. The **Show all levels** check box is the default selection. In the **Custom levels** field, select the number of chart levels you want to show in your chart. The default is automatically cleared.

   Note: If you are publishing an EChart, you select a maximum number of levels to display while you are in the Publishing Wizard. **All levels** is not an option. These levels cannot be changed in the published EChart.

   All information you can view in the OrgPublisher chart or search results list is also displayed when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.
5. Select whether or not you want to display the **Drill-up/Drill-down** buttons.
6. Select whether or not you want to **Drill up custom levels**.
7. Select the number of **Drill up levels**.
8. Select the **Group displayed** in the style from the drop-down list, if applicable.
9. Click **Apply** to update the chart and keep the dialog box open for further changes, or click **OK** to update the chart and close the dialog box.

   Once your chart levels have been set and you are looking at your chart, you can later choose to display all chart levels. Select **View** from the Main menu then **Show All Levels** from the pull-down menu.

Showing or Hiding Fields in the Profile View

1. Right-click on a field in the *Profile View*.
2. Select **Show/Hide fields** from the drop-down list. The *Show/hide fields* dialog opens.

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3. Select the check box for the field or subheading you want to show or hide. A check indicates the field is displayed. A blank box indicates that the field is hidden.
4. You can also rearrange the position of each field, or arrange fields to display beneath a subheading, by clicking the **Move Up** and **Move Down** buttons.
5. Click **OK** to close the dialog. The *Profile View* reflects the changes.

Showing or Hiding Actual Head Count

Note: Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.

1. Select **View** from the Main menu then **Status Bar** from the pull-down menu.

   The Status bar options display in an options list. Each option displays a check mark when selected.
2. Click **Head count** to show the actual head count for the displayed portion of the chart. Or, clear it to hide the actual head count. Shown Head count displays in the lower right section of the Status bar.

Showing the Entire Chart

You can display the entire chart in the *Chart View* from any location or level within your chart. The **Display whole chart** option is available only after you have invoked **Set top of chart**.

- Select **View** from the Main menu then **Display whole chart** from the pull-down menu.
- You can also click on the Display whole chart button  in the toolbar.

OrgPublisher displays as much of the entire chart as the window and the size of your chart allow.

Showing a Portion of the Chart

When you set the top of chart, the selected box and reporting boxes are shown in the Chart View. This option is useful for working with company divisions or other areas of an organization, or for printing a portion of a chart.

You can also create styles using the set top of chart feature.

1. Click on the Box title where you want the portion of the chart to begin.
2. Select **View** from the Main menu then **Set Top of chart** from the pull-down menu. You can also click the Set top of chart  button.
3. Save the style, or create a new style, using the selecting portion of the chart.

Using the Multi-level Peer Display

OrgPublisher provides the option to display all reports at the same chart level or display multiple levels. This option is a formatting function, displays in View Mode only, and can be

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useful if you have, for instance, a Vice President and a manager reporting to the same box and you want to show the hierarchy level of the two positions.

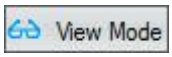
> **Note:** The multi-level peer display does not work when your chart contains multiple people in a box.

When building a chart with data, map your levels to the OrgPublisher Input File field 18. Boxes reporting to an assistant will not have this functionality. You can also save the multi-level peer display as a separate style or use the menu or toolbar options to manually adjust box levels.

> **Note:** If you are working with a large chart that takes a little longer to open, you may want to turn off the multi-level viewing. This will speed up the process. Select **View** from the menu bar and clear **Show multi-level peers** option in the pull-down list.

Planning charts are always in Build Mode, and do not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the advanced box layout settings.

To manually move a box up or down a level:

1. Select **View** from the Main menu and verify that **Show multi-level peers** in the pull-down list is selected.
2. Click View Mode 

in the tool bar.
3. Highlight the name or job title of the box you want to move.
4. Click the Move up  or Move down  button. The box displays at the new level.
5. You can also select **Edit** from the Main menu then **Move up a level** or **Move down a level** from the pull-down menu.
6. Save your chart.

Some things to note about the Multi-level Peer display feature:

- Works in View Mode.
- The top box cannot be moved.
- The first level below the parent box does not move up because it is already at the highest level in relation to the parent box.
- If you move a parent box, all reporting boxes move with it.
- Partners move with their attached boxes.
- You can move (up or down) 10 levels in relation to a parent box.

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Custom Fields Overview

OrgPublisher can display custom field data extracted from your database. The required layout for org chart information is defined in the OrgPublisher Input File Layout. Custom fields automatically begin in column 20 of this file, and summary custom fields begin in column 26.

The first time a chart is created from data, open the *Custom Field Properties* dialog and assign your custom fields to the appropriate position types.

Topics Pertaining to this Section	
Adding a Custom Field	Hiding a Custom Field Label
Changing the Contents of a Custom Field	Inserting a Custom Field for a Single Position Type
Changing the Custom Field Label	Inserting a Custom Field for all Position Types
Custom Field Properties Dialog	Inserting a Head Count Roll-up with the Custom Field Properties Dialog
Designating Custom Fields as Not Searchable	Reviewing Custom Field Security Summary
Displaying a Custom Field	Selecting a Custom Field Date Format
Dragging and Dropping Custom Fields	Setting Search Properties for Custom Fields
Formatting a Custom Field	Specifying a Custom Field Order
Formatting Numeric Custom Fields	

Adding a Custom Field

Custom fields added below box titles contain information pertinent to the whole department or team that the box represents. Custom fields added below a job title contain information about that job. Custom fields added below a person contain specific information about that person or the position they hold.

You can also add custom fields with the Custom Field Wizard.

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button  in the toolbar. The Custom Field Properties dialog opens.
2. Position the cursor where you want to add the new custom field, either somewhere within existing fields, or at the end. Click **Insert**. If you are inserting a field within the list of existing fields, a message dialog verifies that this is what you want to do.
3. Enter the field name in the **Field label** column.
4. Press the **TAB** key to move to the **Type** column and select the type of custom field you are adding, for instance Text.

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Custom Field Type	Description
Text	Alpha/numeric field that displays company information like phone numbers, e-mail addresses, etc.
Hotspot	Displays whatever label or text you enter and links to a destination URL or path you have assigned in the Hotspot Wizard.
Numeric	Any field containing numbers only for calculating data; displays information such as hours of training and years of employment. See also Inserting Formulas.
Currency	Displays monetary values, such as a department's budget, that can be summarized.
Count	Includes a position type in the head count total or a head count by position type that can be totaled.
Summary	Calculates summaries for a numeric custom field, such as: Sum - Total T & E expenses. **Average** - Years of employment. **Minimum** - Training hours. **Maximum** - Sales per salesperson. **Percentage** - Managers to employees.
Average	Numeric summary field used to display the average derived from a calculation of two or more numeric fields.
Minimum	Numeric summary field used to display a minimum number derived from a calculation of two or more numeric fields, for example, a minimum salary range for a specific job.
Maximum	Numeric summary field used to display a maximum number derived from a calculation of two or more numeric fields for example, a maximum salary range for a specific job.
Percentage	Numeric summary field used to display a percent derived from a calculation of two or more numeric fields.
Date	Displays a date field in a specific format.
Email	Displays an active link to an e-mail address message.
Position ID	Required in order to compare two charts that have identical custom field definitions, and generate a change report. If you do not automatically import a position ID (see Field 17 in the Input File Layout topic), in order to achieve consistent results, it is recommended that you assign a custom field type of Position ID to a unique record number across all charts.
Direct Count	In OrgPublisher Premier levels and span of control feature, shows the direct report count for each manager, director, vice president, and president by creating a custom field and assigning the **Direct Count** custom field type.
Level Number	In OrgPublisher Premier levels and span of control feature, show the level number where the box is located in each box by creating a custom field and assigning the **Level Number** custom field type.
Level Below	In OrgPublisher Premier levels and span of control feature, show the number of levels below a manager's box by creating a custom field and assigning the **Levels Below** custom field type.

Note: OrgPublisher looks for the first custom field of Email type when sending email to a group. If you decide to use more than one email address in your chart, the primary email must be first in the custom field sequence order.

OrgPublisher does not change the value of numeric fields you import. For instance, if you import 341.00, that's what the number is in OrgPublisher. If you import 341, that's what OrgPublisher uses. Formatting cannot change the value of the data you import.

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5. If you selected a numeric, currency or count field type, press the **TAB** key to move to the **Calc Field** and select the numeric field on which to do the calculation. See the Formulas and Using Levels and Span of Control topics for additional information.
6. If you selected a numeric, currency or count field type, press the **TAB** key to move to the **Population** column and select the position types, total head count, or planned head count to be included in your calculation.
7. Press the **TAB** key to move to the **Assigned To** column. The *Update Assigned Custom Fields* dialog opens. Select the position types you want to assign the custom field to, such as Manager, Employee, or All Position Types.
8. In the same dialog, choose where you want the field to display, Box title, Job title, or Name. Click **OK** to accept your changes and close the text box. (If you click on the position type name rather than the plus sign (**+**), the Name component is automatically selected.) Click **OK** to close the dialog.

   The **Sample** field displays the contents of the first custom field for this **Type**.

   The **Seq** field displays the OrgPublisher Input File record sequence for that custom field.
9. Click **Apply** or **Close**.

> **Note:** In OrgPublisher, the Summary Wizard inserts placeholders, if necessary, which display in the Custom Field Properties dialog. These fields within OrgPublisher, occupy sequences 20 -25, and are designated as field types other than summaries, such as Text, Hotspot, or Email. As you create summary fields, OrgPublisher starts placing them in sequence 26.
>
> When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher.

Changing the Contents of a Custom Field

You can modify the contents of a custom field at any time.

1. Double-click on the contents of the field in the chart box to select it for editing.
2. Type new field information and either press **Enter** or click elsewhere in the *Chart View*. The new information displays in the box.

Changing the Custom Field Label

You can change the custom field label, or name, within the body of the chart, or by using the Custom Field Properties dialog. Custom field labels change in all the views.

1. Double-click on the custom field label in the *Chart View*.
2. Type the new name and press **Enter**. The label is changed throughout the chart.

   -or-

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button  in the toolbar. The *Custom Field Properties* dialog opens.
2. Double-click in the **Field label** to highlight the current field name.

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3. Type the new name and click **Close** or **Apply**.

Custom Field Properties Dialog

The *Custom Field Properties* dialog can be used to add, change, and display custom fields, and to manually add a numeric custom field after you have defined one or more summary fields in your chart. You can select fields and options in this dialog to create the same type of summary fields as you do with the Head Count Wizard and Summary Wizard, or define formulas used in a summary.

You can also attach a hotspot to a specific field and set security options for custom fields in published ECharts.

Note: New with OrgPublisher 11, custom fields containing formulas are designated in the *Custom Field Properties* dialog by "(f)" in the **Sample** column field.

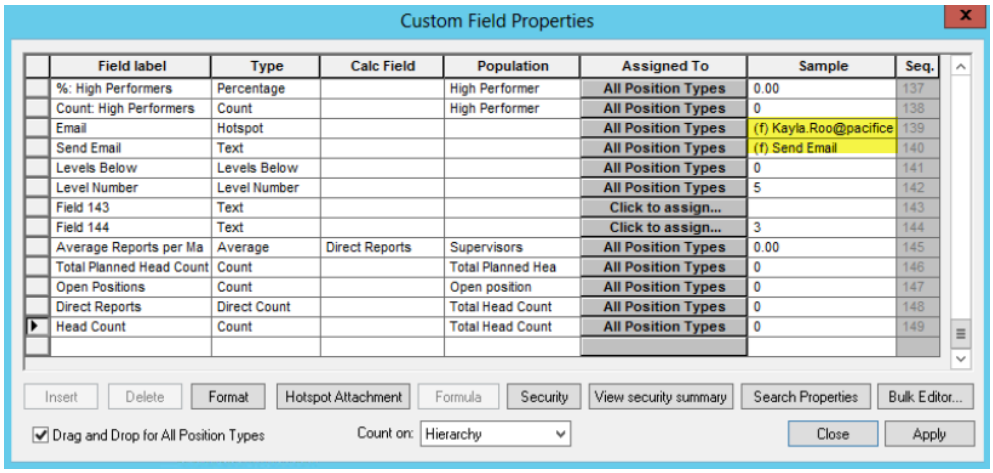


Figure 76.

You can access the *Custom Field Properties* dialog from the **Data** menu option, or by clicking the Custom fields button in the toolbar.

Designating Custom Fields as Not Searchable

You can designate custom fields as not searchable in the published chart. End users will still be able to see these fields in the chart, but will not be able to conduct a search using that data.

Note: This feature is also seen in the published cross browser/Silverlight chart.

1. Select **Data** from the Main menu then **Custom field properties** from the options list. You can also click the Custom fields button in the toolbar. The Custom Field Properties dialog opens.
2. Select the custom field you do not want end users to find when conducting a search in the published chart by clicking on the gray cell next to the custom field name.
3. Click **Security**. The *Custom Field Security* dialog opens.

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4. The check box at the top of the dialog determines if the field is searchable in the Search View and Search dialog. Select the check box if you want to allow end users to search on this field name. Clear the check box if you do not want to allow end users to search on this field name.

   If you are publishing your chart as a secured EChart, you can also secure customs fields. See the Securing ECharts procedure for details.

   > **Note:** Published real-time charts use IIS security only. Custom field, group, and styles security do not apply.

5. Click **OK** to accept the change and return to the Custom Field Properties dialog.
6. Click **Apply** to accept the change in the current chart and continue to work in the dialog. Click **Close** to exit the *Custom Field Properties* dialog.

   > **Note:** Keep in mind that when you choose to show or hide information you can view in the OrgPublisher chart or search results list, that the information is also displayed when you copy the chart to Microsoft PowerPoint or copy the search results list to Microsoft Excel.

   Making a field "not searchable" does not hide it in the chart or other views.

Displaying a Custom Field

The **Assigned To** field in the Custom Field Properties dialog determines where the custom field is displayed in the chart. EChart field security, such as securing a field hierarchically or by group, also affects whether or not end users can view custom fields.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens. You can also use the Custom fields button  in the toolbar.
2. Position the cursor on the custom field, and press the **TAB** key to move to the **Assigned To** column.
3. Select the position types for this custom field and click **Apply**.

Dragging and Dropping Custom Fields

You can insert a custom field into your chart by dragging the custom field from the *Custom Field Properties* dialog into the *Chart View*. You can add a custom field to one position type or to all position types.

Inserting a Custom Field to a single Position type

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields  button in the toolbar. The *Custom Field Properties* dialog opens.
2. Verify that the **Drag and Drop for All Position Types** check box is not selected. If it is, click to clear it.
3. Select the custom field you want to drop into the chart. Click and hold down the mouse button.
4. Drag the mouse cursor into a box in the chart that contains the position type you want.

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5. Release the mouse button. The custom field is inserted in every instance of that specific position type in the chart.
6. Repeat steps 3 - 5 for each custom field you want to add.

Inserting a Custom Field to all Position types

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields  button in the toolbar. The Custom Field Properties dialog opens.
2. Verify that the **Drag and Drop for All Position Types** check box is selected.
3. Select the custom field you want to drop into the chart. Click and hold down the mouse button.
4. Drag the mouse cursor into a box in the chart and release the mouse button. The custom field is inserted in every position type in the chart.
5. Repeat steps 3 - 4 for each custom field you want to add to all position types.

Formatting a Custom Field

When you manually create a numeric custom field, you can format that field by selecting the appropriate values. You can also format a date field.

Property	Value
Leading symbol	Select a symbol that precedes the numeric custom field, for example **£** or **#**.
Trailing symbol	Select a symbol to follow the numeric custom field, for example a percentage sign (**%**).
Decimal places	When using the summary feature, you can type the number of digits shown after the decimal.
1000 separator	Select a character to separate thousands within a numeric custom field, for example a comma (**,**).
Negative values	Select a symbol to represent a negative value, for example a minus sign (**-**).
Show negatives in red	Select this option to display all negative numeric custom fields in red.
Suppress zero values	Select this check box if you do not want to display zero values in your chart.

Note: When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields into OrgPublisher, as they cannot be adjusted after they are imported.

Formatting cannot change the value of the data you import

Formatting a numeric field

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. The Custom Field Properties dialog opens. You can also use the Custom fields  button in the toolbar.

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2. Select a numeric custom field then click **Format**. The *Field Format* dialog opens.
3. Type values for the properties that pertain to this field. For example, if the field is a percentage, you can select **%** in the **Trailing Symbol** field.
4. Click **OK** to apply the properties.

Formatting a date field

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens. You can also use the Custom fields button in the toolbar.
2. Select a date custom field then click **Format**. The *Select a date format* dialog opens.
3. Click the down arrow in the **Date Format** field and select the format you want. The options are:
   - **MM/DD/YYYY**
   - **DD/MM/YYYY**
   - **DD.MM.YYYY**

   Note: If you want to use the data formatting (or the search criteria of <>) in Custom Field Properties dialog when building a chart with data, OrgPublisher must receive the data with a 4-digit year then the month and the day; for example, "YYYYMMDD" if you want to change the format to display as "DDMMYY."
4. Click **OK** to apply the format.

Hiding a Custom Field Label

You can choose to hide a custom field label in your org chart.

1. Right-click the custom field label in your chart.
2. Select **Hide label** from the drop-down menu. The label is no longer displayed in your chart.
3. To show a hidden label, right-click on the custom field data and click **Show label** from the drop-down menu.

   You can also select the **Hide label** option in the *Custom Field Wizard* when you create or modify a custom field.

Inserting a Custom Field for a Single Position Type

You can insert a custom field for a single position type by dragging it from the *Custom Field Properties* dialog.

Note: The use of conditional formatting can affect position type summary fields.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button. The *Custom Field Properties* dialog opens.

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2. You can also use the Custom fields button in the toolbar and move the mouse pointer to the place within an existing box where you want to insert the custom field. Click the mouse to add it.
3. Make sure the field **Drag and Drop for All Position Types** is not selected. Click **Close**.
4. If the check box is selected, click on it to clear it then click **Apply**.
5. Position the cursor in the column to the left of the **Field label** of the custom field to be added. Click in the column and hold the mouse button down as you drag that custom field into the chart and place it within an existing box. Release the mouse button to add the custom field.
6. Double-click on the label for this custom field and type the new name, if applicable. Press **Enter**.
7. The new field displays in the dialog and the chart.
8. If you are adding the field data manually, double-click on the right-hand side of this field and type your data, for example a phone number. Press **Enter**.
9. If you want to format the new custom field, right-click on the field and select **Format** from the drop-down menu.

Inserting a Custom Field for all Position Types

You can insert a custom field for all position types by dragging it from the *Custom Field Properties* dialog.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields button in the toolbar. The *Custom Field Properties* dialog opens.

   In addition, you can use the Insert Custom Field button in the toolbar and move the mouse pointer to the place within an existing box where you want to insert the custom field. Click the mouse to add it.
2. Make sure the field **Drag and Drop for All Position Types** is selected. Click **Close**.

   Note: You can also use this check box in conjunction with the Insert Hotspot button in the Insert toolbar.
3. If the check box is not selected, select it and click on **Apply**.
4. Position the cursor in the column to the left of the **Field label** of the custom field to be added to a position type. Click in the column and hold the mouse button down as you drag that custom field into the chart and place it within an existing box. Release the mouse button to add the custom field.
5. Double-click on the label for this custom field and type the new name, if applicable. Press **Enter**. The new field displays in the dialog and with every position type displayed in the chart.
6. Double-click on the right-hand side of each occurrence of this field and type your data, for example a phone number. Press **Enter**.
7. If you want to format the new custom field, right-click on the field and select **Format** from the drop-down menu.

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Inserting a Head Count Roll-up with the Custom Field Properties Dialog

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom fields  button in the toolbar. The *Custom Field Properties* dialog opens.
2. Position the cursor where you want to add the new custom field, either somewhere within existing fields, or at the end. Click **Insert**. If you are inserting a field within the list of existing fields, a message verifies that this is what you want to do.
3. Enter the field name in the **Field label** column.
4. Press the **TAB** key to move to the **Type** column and select **Count**.
5. Press the **TAB** key to move to the **Population** column and select the position type or group you want to count. You can select one or more position types or groups, or the **Total Head Count**, or the **Total Planned Head Count**.

   Note: Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.
6. Press the **TAB** key to move to the **Assigned To** column. The *Update Displayed Custom Fields* dialog opens. Select the position types or groups for this custom field. If you want all position types to have this field, select **All Positions**.
7. Click **Close** to insert the new head count in your org chart and to close the *Custom Field Properties* dialog.

   Note: In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.

   Succession candidates are not included in head counts.

Reviewing Custom Field Security Summary

In OrgPublisher Premier, you can designate field security and then quickly review a summary of the security for each custom field in your EChart.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also use the Custom fields  button in the toolbar. The *Custom Field* Properties dialog opens.
2. Click *View security summary*. The *Field Security Summary* dialog opens, displaying the custom fields in your chart and the type of security assigned to each.
3. Click **Copy to Clipboard** if you want to copy the summary to another application for printing or to view later, or click **Close** to return to the *Custom Field Properties* dialog.

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Selecting a Custom Field Date Format

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens. You can also use the Custom fields button in the toolbar.
2. Select a date custom field then click **Format**. The *Select a date format* dialog opens.
3. Click the down arrow in the **Date Format** field and select the format you want. The options are:
   - **MM/DD/YYYY**
   - **DD/MM/YYYY**
   - **DD.MM.YYYY**

   Note: If you want to use data formatting (or the search criteria of <>) in Custom Field Properties dialog when building a chart with data, OrgPublisher must receive the data with 4-digit year, then the month and the day; for example, "YYYMMDD" if you want to change the format to display as "DDMMYY."
4. Click **OK** to apply the format.

Securing Custom Fields in ECharts

You can display data for select employees based on search criteria and group membership when you publish in EChart format. This security option restricts the display of custom field data unless the user record is a member of a specific group.

1. Create a group containing the employee records you want to view.
2. Open the Custom Fields Properties dialog and select the field to secure.
3. Click **Security** to open the *Custom Field Security* dialog.
4. Setup up the desired security attributes:
   a. Will the field be searchable? If yes, select the **Allow** check box at the top of the dialog.
   b. Can the end user see the data for the **Entire Chart**, the **User's box and subordinates**, or the User's subordinates only? Select the appropriate radio button.
   c. Can everyone see the field or only certain groups of individuals? If certain groups only, click the down-arrows to choose:
   d. The group that can see the field
   e. The group where the field will appear in the chart

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5. Select the group where the field will display.


Custom Field Security
Allow this field to be searchable in the search view and the search dialog. Making a field non-searchable does not hide the field in the chart and other views.
Options for secure ECharts
Fields can be secured based on the user's place in the hierarchy. This field should be viewable in:
Entire chart
User's box and subordinates
User's subordinates only
Fields can be secured based on a group that the user belongs to. This field should be viewable only by users who are in this group:
Management Team
Fields can be secured so that they're only visible in the records of members of a certain group:
High Performer
Note: Fields will be visible only when all of the above criteria are satisfied. For example if a field is set to display for the user's subordinates and group 'x', the field will only be visible in subordinate boxes of users who are in group 'x'.
OK
Cancel

Figure 77.

If the end user can see all records in the chart, the secured field data displays for the group identified in Step 4c1.

If the end user can only see within their designated span of control; the secured field data in boxes only within that span of control.

Example –Unpublished chart where all fields are viewable



Figure 78.

Example – Published chart with HR Specialist logged in and viewing sensitive data for their area of responsibility (**User's box and subordinates** selection)

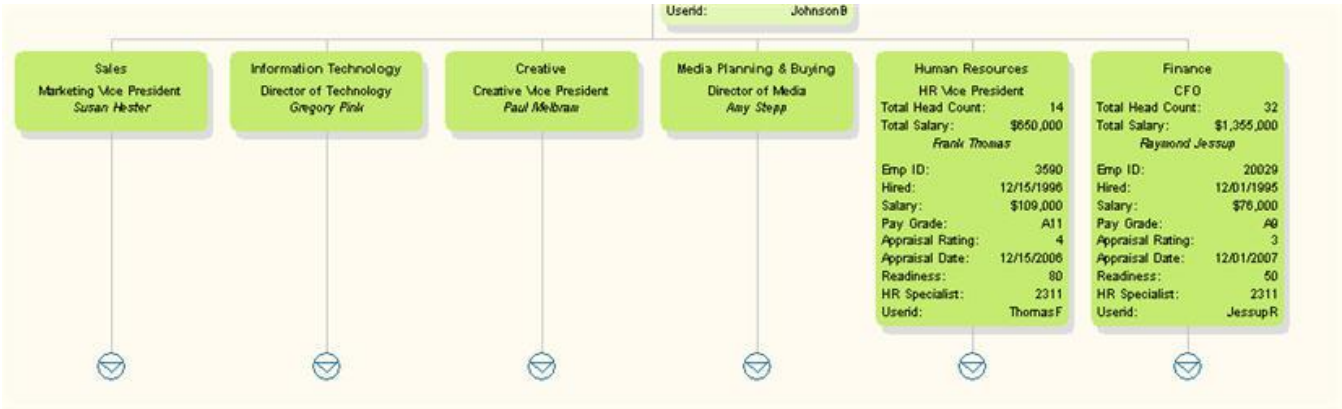


Figure 79.

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Example – Published chart with user logged in and viewing sensitive data for a specific group (role-based security), **Below Average Performers**

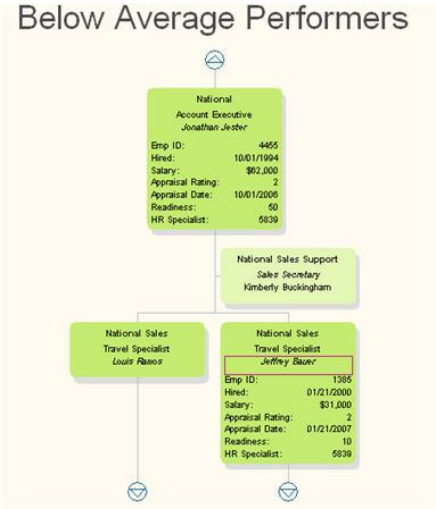


Figure 80.

Setting Search Properties for Custom Fields

You can specify suggested values on which users can search custom fields.

1. Click the Custom fields button  in the toolbar to open the *Custom Field Properties* dialog.
2. Select the custom field for which you want to set search properties, for instance Birthdate.
3. Click the **Search Properties** button to open the *Search Properties for* dialog.
4. Accept the default of **Allow this field to be searchable** if you want end users to be able to find this field while searching.

   Clear the check box if you do not want the field found during a search.

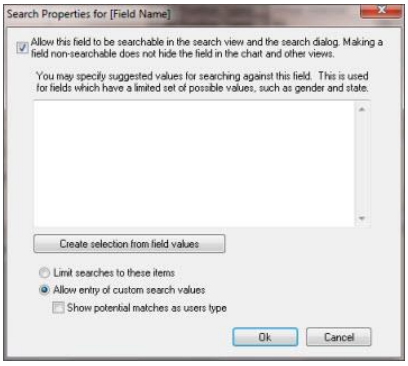

Search Properties for [Field Name]
Allow this field to be searchable in the search view and the search dialog. Making a field non-searchable does not hide the field in the chart and other views.
You may specify suggested values for searching against this field. This is used for fields which have a limited set of possible values, such as gender and state.
Create selection from field values
Limit searches to these items
Allow entry of custom search values
Show potential matches as users type
Ok
Cancel

Figure 81.

5. You can accept the default to **Allow entry of custom search values** if you want end users to type whatever characters they want to search on.

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6. When choosing to allow customer search values, you can also select the **Show potential matches as users type** check box. This option displays a preview pane with potential matching records as the user types the search criteria.
7. If a field has a limited number of possible values, you do not have to accept the default. You can specify values to search on by clicking **Create selection from field values**.

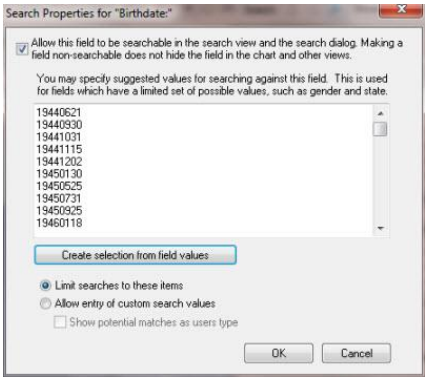

Search Properties for "Birthdate:"
Allow this field to be searchable in the search view and the search dialog. Making a field non-searchable does not hide the field in the chart and other views.
You may specify suggested values for searching against this field. This is used for fields which have a limited set of possible values, such as gender and state.
19440621
19440930
19441031
19441115
19441202
19450130
19450525
19450731
19450925
19460118
Create selection from field values
Limit searches to these items
Allow entry of custom search values
Show potential matches as users type
OK
Cancel

Figure 82.

Values that have been entered for that custom field display in the pane in the center of the dialog.

8. Select the **Limit searches to these items** radio button. Click **OK** to accept your selections and close the dialog.

   When the selected field is searched on, using the *Search View* or *Search* dialog, the first value displays automatically in the blank field.

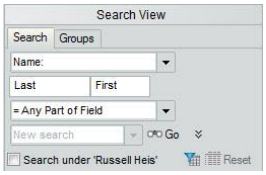


Figure 83.

9. Click the down-arrow to display all the available values.

   In the *Search View*, select the field they want, then click 

. The record with the searched for value displays in the results pane.

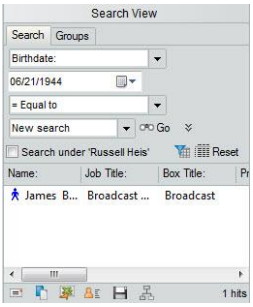


Figure 84.

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In the *Search* dialog, end users can select the **All Fields** tab, then the field they want. The first value displays automatically in the **For** field.

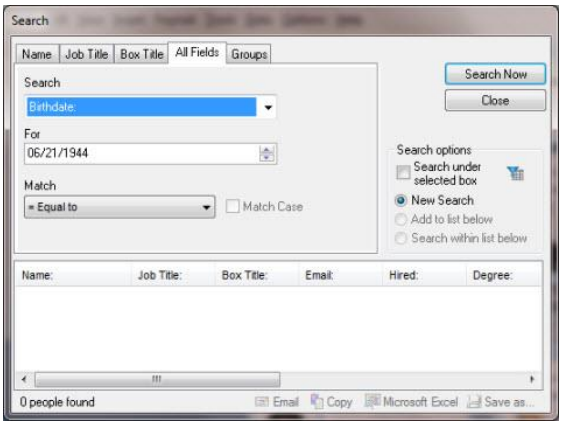


Figure 85.

In the case of the Birthdate field in this example, end users can then highlight the month, date, or year and change the value by typing over it or using the up or down arrow in the field.

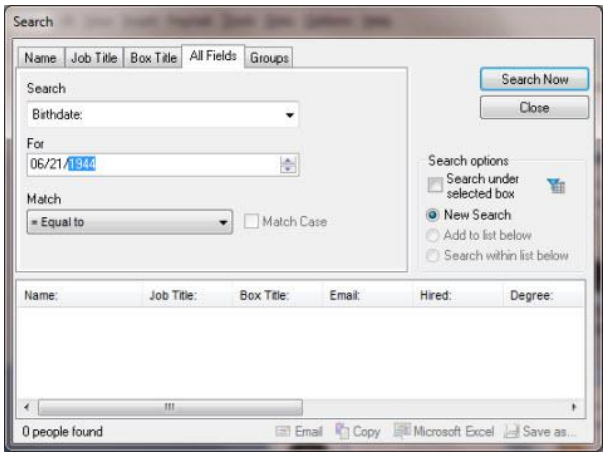


Figure 86.

In the case of the Birthdate field in this example, end users highlight the month, date, or year and change the value by typing over it or using the up or down arrow in the field, then click **Search Now**.

Specifying a Custom Field Order

This procedure assumes the following:

- You are building an org chart from an ODBC database.
- You have become familiar with the OrgPublisher Input File Layout requirements.
- You have reviewed the **Data Preview** in the New Chart Wizard.
- You have clicked **Next** in the *Data Preview* dialog to accept the data.

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1. After accepting the data preview, the next option allows you to accept the standard OrgPublisher field order, or you can set the custom field order, as illustrated below.
2. Select **Specify custom field order** then click **Next**.

   The *Data Preview* dialog enables you to map the displayed field names to the OrgPublisher input layout.

   If you are working with the Prebuilt Reports feature, see the Prebuilt Reports - Create a New Report procedure for additional information.
3. Select an option for **Sort drop lists**, either **Field name** or **Field position**.
4. Above each column of data, a drop-down arrow appears with the default selection of **Do not import.** Click the drop-down arrow to display other field options. Select the appropriate option for that field/column of data.

   As you select the field options (other than Custom Field) in the drop-down list and move to another column the previously selected mapping options "fade." This indicates that you have already identified a field/column for this type.

   If a field type (other than Custom Field) is used more than once, the field type switches to red text. Duplicate usage of a field type must be limited to Custom Fields.

   Other mapping options in the list include **Parent Box ID**, **Box ID**, **Person ID**, **Position Sequence**, **Level Number**, etc.

   When you finish mapping, click **Next**.
5. You may need to map a single column of data as more than one field type. For instance, you have a column of data that contains the Employee Number. You want to use it as input field 5 (**Person ID**) as well as display the field in the chart as a custom field. Scroll down to the last field type option and click **Multiple**. The *Multiple Field Mapper* dialog opens.

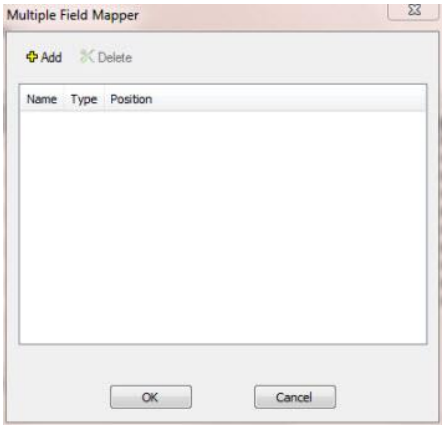


Figure 87.

6. Click **Add**. The *Multiple Field Mapper* inserts **Custom Field** as the first mapping type.

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7. In the **Name** column, click **Custom Field** to display all the available options.

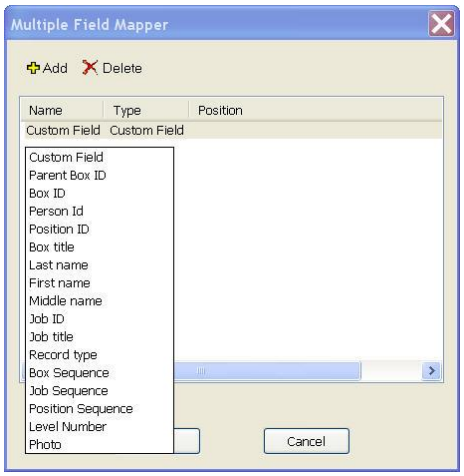


Figure 88.

8. Select the field type you want to apply.
9. Click **Add** to insert the second instance of the field.
10. Repeat Steps 4-8, if applicable.

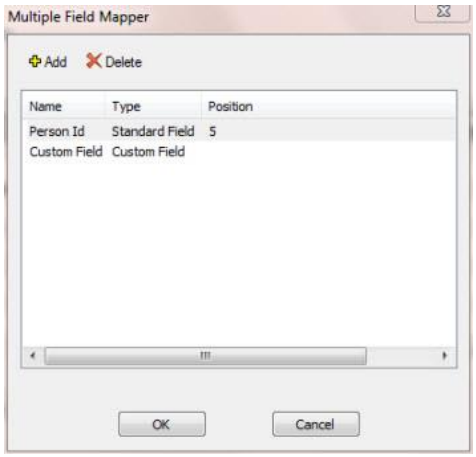


Figure 89.

11. Click **OK** when you have finished mapping the field. The mapped column is now labeled as **Multiple** in the New Chart Wizard.
12. Complete mapping your fields, then click **Next**.
13. If you do not want to **Launch the style wizard**, clear that check box. Click **Finish**.
14. OrgPublisher displays the chart. Any custom fields or custom position types brought into the chart must be defined in OrgPublisher.
15. Save the chart file. It will have an .odbx extension.

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Position Types

OrgPublisher provides standard position types in order to create your organizational hierarchy. You can also create your own position types either to better match a position within your company.

In addition, you can assign a group, based on a single attribute to create a conditional position type. You can then use conditional formatting to increase visibility of that group in your chart.

Note: Only Staff Function position types can reside in a Staff Function box.

Topics Pertaining to this Section	
Position Type Wizard	Creating a Staff Function Position Type
Adding a Custom Position Type	Including/Excluding Position Types in Summary View
Assigning a Position ID Type	Listing All or Current Positions
Selecting a Position Type for Insert	Making Several Insertions for the Same Position Type
Changing a Person's Position Type	Renaming a Position Type
Changing Direct Reports to Indirect Reports	Showing or hiding All Options Associated with a Position type
Changing from an Open Position	

Adding a Custom Position Type

1. Select **Tools** from the menu bar then **Position type Wizard** from the drop-down list. The Position Type Wizard opens. Click **Next**.
2. Select the **New Position Type** radio button. Click **Next**.

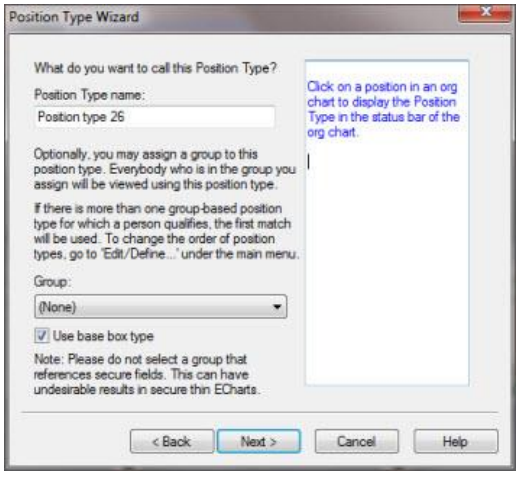

Position Type Wizard
What do you want to call this Position Type?
Position Type name:
Position type 26
Optionally, you may assign a group to this position type. Everybody who is in the group you assign will be viewed using this position type.
If there is more than one group-based position type for which a person qualifies, the first match will be used. To change the order of position types, go to 'Edit/Define...' under the main menu.
Group:
(None)
Use base box type
Note: Please do not select a group that references secure fields. This can have undesirable results in secure thin ECharts.
Click on a position in an org chart to display the Position Type in the status bar of the org chart.
< Back
Next >
Cancel
Help

Figure 90.

3. Type the **Position Type name**.

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4. If you are creating a position type in order to assign conditional formatting to a group, click the down-arrow and select a single attribute **Group** name. If you choose a group in this step, then next step allows you to retain the original box type.
5. When associating a group for conditional formatting, you can retain the original box type by accepting the default **Use base box type** selection. Click **Next**.

   Note: It is recommended that you do not select a group that references secure fields if you plan to publish a secure thin client EChart because you will receive undesirable results.

   The rich client EChart summary counts using conditional formatting show numbers calculated as if all fields are visible to the end user. This is because EChart summaries are calculated at publishing time and cannot be recalculated.

   If there is more than one group-based position type for which a person qualifies, the first match is used in Search and Summary tasks.
6. Indicate whether the new position type is to be displayed in a **Normal Box**, **Assistant Box**, **Partner Box**, or **Staff Function Box**. Click **Next**.
7. Indicate if the position type is to be included in the total Head count by selecting the **Yes** or **No** radio button. Click **Next**.
8. Type or select a **Record Type** code for this position. Click **Next**.

   Note: Record Types for custom position types should use brackets, for example, <T>.
9. Click **Box Style and Color** to open the Format dialog to the **Box** tab. Choose the style of the chart box and the box color. Click **OK**.
10. Click **Text Style and Color** to open the *Format* dialog to the **Text** tab. Choose the text color, alignment, etc. Click **OK** then **Next**.
11. Click **Finish**. The new position type is saved within your chart file, even if you do not actually save the chart after creating the position type.

Assigning a Position ID Type

You can compare two charts that have identical custom field definitions, and generate a change report. If you do not automatically import a position ID (see **Field 17** in the Input File Layout topic), in order to achieve consistent results, it is recommended that you assign a custom field type of **Position ID** to a unique record number across all charts.

Note: If the charts you are comparing do not contain a Position ID type in field 17 or a custom field position type, OrgPublisher uses the ID in field 5 from the Input File Layout. If neither exist, an error message displays and the comparison does not occur.

In addition new or renamed custom fields will not match when comparing charts and will not be included in the change report.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also click the Custom Field Properties button  in the toolbar. The Custom Field Properties dialog opens.
2. Select the custom field you want to use for **Position ID** and **TAB** to the **Type** column.

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3. Click the down-arrow to view a list of custom field types.
4. Scroll to the end of the list and select **Position ID**.
5. Click **Apply** or **Close**.

Selecting a Position Type for Insert

The first time you open OrgPublisher, an employee position type is automatically assigned to the first inserted box. After that, the default is the last position type assigned.

Note: You can also assign a position type using the Update Person dialog or define the priority of a position type.

1. Select **Insert** from the Main menu then **Select position type** from the pull-down menu. The *Select Position Type for Insert* dialog opens.
2. Choose a position type by clicking on it. A green check mark indicates the current selected position type.
3. If you want to choose a position type to insert for each person you add to your chart, select the **Insert using this Position Type** check box. OrgPublisher assigns each subsequent person that position type.
4. If you want OrgPublisher to use the default position type, the last one inserted, select the **Automatically assign Position Type** check box. This is the default when you first open OrgPublisher and the Employee position type is selected.
5. Click **OK** to accept the changes and close the text box.

Changing a Person's Position Type

1. Double-click on the person's name in the *Chart View*. The *Update Person* dialog opens.
2. Double-click the new **Position type** you want to use. The *Update Person* dialog closes and the new position type is accepted. You can also select the new position type from the list, then click **OK**.

   The person in the box inherits the formatting of the new position type. In addition, the ID field contains the unique ID information necessary to enable the use of multi-relationship icons and EChart security.

Changing Direct Reports to Indirect Reports

Indicating that one person reports to more than one manager is accomplished with multiple records and use of position types. One box must be designated position type "**E**" for Employee. Other boxes must be designated position type "**I**" for indirect report. (Indirect reports are not counted for head count purposes.) By default, OrgPublisher displays this type of indirect relationship, or matrix reporting, as a dotted line box and connecting line in the *Chart View*.

Indirect report boxes are displayed with dotted lines around the box, as well as the lines to the report-to box.) When building from data, you need multiple employee records — one for each manager (see sample of data below).

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If you are building from data the records should look like the following:

ParentBoxID	BoxID	Box Title	Record Type	ID	Last Name	First Name
Manager 1	1234	xxx	E		Smith	Carol
Manager 2	1234a	xxx	I		Smith	Carol
Manager 3	1234b	xxx	I		Smith	Carol

You can modify the display for indirect boxes and connecting lines using the **Format** menu option. In addition, you can add multi-relationship icons to boxes with indirect reports.

1. Verify that you are in Build Mode then double-click on the name in the chart that you want to change from a direct report to an indirect report. The *Update Person* dialog opens.
2. Click **Indirect Report** in the **Position type** column.
3. Click **OK**. The box and connecting line now display in the chart with a dotted line, indicating an indirect reporting relationship.

   If you change an assistant from a direct to an indirect report, the internal record type also changes, from A (Assistant) to IA (Indirect assistant).

Changing from an Open Position

You can change an open position to the appropriate position type at any time.

1. Verify you are in Build Mode then double-click the open position in the *Chart View*. The *Update Person* dialog opens.
2. Type the name of the person who filled this position in the **First name**, **Second**, or **Last name** fields.
3. You can also update the **ID** field in this dialog, if required.
4. Select the **Position type** from the list if the chart box does not designate one already.
5. Click **OK**. The open position text in the chart box is replaced by the person's name. If the chart box is an assistant or partner box, the position type will change automatically when you enter a person's name.

Creating a Staff Function Position Type

Use the Position Type Wizard to create a position type to add a Staff Function to an existing chart. Once this position type is established, you can insert a Staff Function box type to your chart. If you open an empty chart, the Staff Function is already available in the wizard.

Note: Only Staff Function position types can reside in a Staff Function box.

1. Select **Tools** from the Main menu then **Position type Wizard** from the pull-down list. The *Position Type Wizard* opens.
2. Click **Next** and select the **New Position Type** radio button. Click **Next**.
3. Type the **Position Type name** for which you are creating the Staff Function box or type "Staff Function." Click **Next**.

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4. Select the **Staff Function Box** radio button. The actual box type does not contain special formatting by default, but you can format the box to your specifications, as noted in Steps 7-8. Click **Next**.
5. Indicate whether or not this new position type is included in the total head count. Click **Next**.
6. Type the **Record Type** code for this position, **<SF>**. The code must be include brackets. Click **Next**.
7. Click **Box Style and Color** to open the Format dialog to the **Boxes** tab. Choose the style of the chart box and the box color you want for the Staff Function position type. Click **Apply** to add your changes and continue working in the dialog. Click **OK** to add your changes and close the dialog.
8. Click **Text Style and Color** to open the *Format* dialog to the **Text** tab. Choose the text color, alignment, etc. Click **Apply** to add your changes and continue working in the dialog. Click **OK** to add your changes and close the dialog. Click **Next**.
9. Click **Finish**.
10. In the *Chart View*, add a box with a person and job where you want to place the Staff function.
11. Double-click on the name field to open the Update Person dialog and select the Staff Function position type.
12. The staff function box title displays and the box may be repositioned. Double-click on **Staff Function** to change the box title. If you add reports to this box, a drill-down button displays and you must drill to view those reporting boxes.

Including/Excluding Position Types in Summary View

When you exclude, or do not count, a position type in the *Summary View* in OrgPublisher Premier, the summary amounts for these types are not displayed in the view, and are subtracted from any totals, except for group totals.

Exclude managers from their own totals

1. Select **Options** from the Main menu then **Summary options** from the pull-down menu.
2. Select **Exclude managers from their own totals**. The totals in the manager boxes no longer include the manager.
3. You can also exclude managers from their own totals when using the Summary Wizard.

Exclude/include Position Types in totals

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens.
2. Click on the record line of the position type you want to exclude from your *Summary View* totals. By default, indirect reports and contractors are already excluded from the totals.

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3. Click in the **Count** field. A drop-down arrow appears.
4. Click **No**. If you want to include a position type, for example indirect reports, click **Yes**.
5. Click **OK** to accept the change and close the *Define* dialog.

> **Note:** The use of conditional formatting can affect position type summary totals.

If there is more than one group-based position type for which a person qualifies, the first match is used in search and summary tasks.

Listing All or Current Positions

The *List View* displays all of the positions in your chart, or only those positions which are currently shown in the *Chart View*. The current OrgPublisher default is to display *only the positions currently displayed in the chart*.

If you want to list all positions in your chart file, you can:

1. Select **Options** from the Main menu then **List View options** from the pull-down menu.
2. Clear **Show Displayed Positions**. The **List View** now displays all positions in your chart data.

   -or-

   - Open the *List View* and select the Search View pane. Verify that the **Everyone** group is active in the chart. All positions are listed in the *Search View*.

Making Several Insertions for the Same Position Type

You can apply the format for the same position type to several boxes or jobs if you select a position type before you begin inserting boxes.

1. Select **Insert** from the Main menu then **Select position type** from the pull-down menu. The *Select Position Type for Insert* dialog opens.
2. Click on the position type you want to insert and clear the **Automatically assign Position Type** check box.
3. If you are inserting multiple boxes with this position type, or you want to make it the default position type when you insert a box, click the **Insert using this Position Type** check box.
4. To automatically assign a manager position type to the first inserted box and an employee position type on the box dropped on that position, click the **Automatically assign Position** Type check box.
5. If you do not select either check box, OrgPublisher prompts you for the position type when you insert a job or person into an empty box.
6. Click **OK**. The dialog closes.
7. Select the appropriate button from the toolbar and insert the box where you want it.

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Renaming a Position Type

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens at the **Positions** tab.
2. Select the record line for the position you want and, in the **Position type** field, type the label name you want to use.
3. Click **OK**. All instances of that position in your chart display the new text.

Showing or Hiding All Options Associated with a Position Type

1. Select **View** from the Main menu then **Show/Hide chart components** from the pull-down menu. The *Show/Hide Chart Components* dialog opens. You can also click the Show/Hide Chart Components  button in the toolbar.
2. At the top of the dialog, select a **Style** to modify from the drop-down list.
3. At the bottom of the dialog, select a **Group displayed** to modify in the chart, if applicable.
4. Select the **Components** tab. Each position type in your chart is listed. Click on the plus sign to display each component within the position type. A green check mark to the left indicates a shown component, and a red X indicates a hidden component.
5. Select a position type, or **All Position Types**, to change the status. All components for the position type are affected unless you place an X next to the individual component.
6. Click **Apply** to update the chart and keep the dialog open for further changes, or click **OK** to update the chart and close the dialog.

> **Note:** In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.

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Hotspot Links

Hotspots provide a way to create links in an org chart that is published and viewed with a web browser, such as Internet Explorer. Any string that can be typed in an address line of a browser can be used as a hotspot, such as mailto:, http://, file://, etc. Hotspots are a type of custom field assigned to a specific position type, or all position types, and they appear in listings with other custom fields.

You can create hotspots with the Hotspot Wizard, attach a hotspot to a specific custom field using the *Custom Field Properties* dialog or use the Define dialog to define the URL path to the link.

Topics Pertaining to this Section	
Accessing Smart Links	Inserting Hotspots
Assigning Hotspots to Position Types	Setting a Base URL (Path)
Attaching A Hotspot to a Field	Using the Define Dialog

Inserting Hotspots

You can set up a hotspot on a box title, job title, person's name or custom field to view another web page pertaining to the selected text. Hotspots can be clicked in the *Chart View*, *Profile View*, and the *Hover Profile* to open an e-mail message (with the format mailto:), or to link to a page on your intranet or a Web page.

The Smart Links feature enables you to attach more than one hotspot to a field. When the end user clicks on a custom field, a list displays the names of all the hotspots attached to that particular field.

Note: You can use hotspots to link to any file type that your web browser can recognize and display.

To insert a Hotspot using the toolbar button.

1. While in Build Mode, select the box needing the hotspot link.
2. Move the cursor to the toolbar and click on the Insert Hotspot  button.
3. Release the mouse button and move the cursor to the selected box. The pointer changes to  .
4. Click inside the destination box. The *Hotspot Wizard* opens.

   You can also open the *Hotspot Wizard* directly from the **Tools**>**Hotspot Wizard** menu option.

Manually Edit a Hotspot Label:

1. Double-click the hotspot label to select it for editing.
2. Type a new hotspot label. Every occurrence of this label is changed.

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Manually Edit a Hotspot File Information:

1. Verify that you are in Build Mode.
2. Double-click the file information area to select it for editing.
3. Type a new file name.

Attaching a Hotspot to a Field

You can attach a hotspot to a custom field by using the *Custom Field Properties* dialog. In addition you can attach multiple hotspots, known as Smart Links, to a field.

Note: *Profile View* hotspots do not work in the published PluginX or Planning charts when the hotspot data points to a data file from the local drive. Web pages, even those served from the local file system, are not allowed to access, open, or otherwise "touch" the local file system. This is a security measure as web pages shouldn't be allowed to do anything with your local files.

1. While in *Build Mode*, verify that you have correct URLs in your hotspot fields.
2. Select **Data** from the Main menu and **Custom Field Properties** from the pull-down menu or click the Custom fields button  in the toolbar. The *Custom Field Properties* dialog opens.
3. Select the hotspot you want to attach to a field. Only fields with a designated **Type** of **Hotspot** can be attached to another field.
4. For instance, if one of your custom fields is an e-mail address hotspot, instead of displaying the e-mail address in the published chart, you can attach the hotspot to the **Name** field. When users click on a name in the published chart, the e-mail client opens.
5. Click **Hotspot Attachment**. The *Attach Hotspot* dialog displays.
6. Click the down-arrow in the **Select field to attach hotspot** field.
7. From the pull-down list, select the field you want to be the "clickable" link in your published chart, for instance the **Box Title** or **Name**.
8. Click **OK**. The text box closes.
9. In the *Custom Field Properties* dialog, click **Apply**. Continue working in the dialog or click **OK** to close the dialog.
10. Test your hotspot by switching to View Mode and click on the field to which you attached the hotspot. If you attached multiple hotspots to a field, the list of Smart Links displays when you click on a field. Select the link you want to access.

Note: Smart Links attached to a hidden field do not appear in the chart.

Assigning Hotspots to Position Types

When you create hotspots, a type of custom field, using the *Hotspot Wizard*, you assign the hotspot to either a specific position type or to all position types. Assigning a hotspot to a single position type, such as open position, can allow links to the appropriate job descriptions. Assigning a hotspot to all position types in your chart allows you to make the

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physical locations, telephone extensions, or e-mail addresses of all employees accessible to all employees.

1. Click the Insert Hotspot button  in the toolbar. Drag the cursor to the location in the chart where you want to add the hotspot and click the right mouse button. You can also select **Tools** from the Main menu then **Hotspot Wizard** from the options list. The Hotspot Wizard opens.
2. Follow the *Hotspot Wizard* prompts asking for the base path or target name, until you reach the dialog asking you to select the position types for which the hotspot will be active.
3. Click on the position type to expand it. You can also click **All Position Types**.
4. Click on the field you want as the hotspot link, **Box Title**, **Job Title**, or **Name**. A green arrow displays next to the selected field and the position type label. Click **Next**.
5. Follow the prompts to complete the wizard and open the Custom Field Properties dialog to attach the hotspot to a field and, if applicable assign security.

Setting a Base URL (Path)

The base URL is the common path or command string for all hotspots or photos in the chart. To set up a base URL (path), you must store the hotspots or photos for your chart in the same location.

OrgPublisher appends the base URL to the beginning of each link in your chart, which means you do not have to type the complete path or string for each hotspot or photo. (At the same time, you are supporting browsers that require fully qualified URLs.) For example:

- If all the links in your chart are to e-mail addresses of people within your organization, set up the base URL as mailto:. However, it is recommended that you use the Custom Field Properties dialog to set an E-mail custom field type to create your e-mail link.
- If you have links to company documents or photos saved on a network drive, for example the T drive, set up the base URL as file://servername/folder name/.
- If these documents or photos are saved on your intranet, you might set up the base URL as http://www.companysite.com /CompanyDocuments/.

  Note: You must include the trailing forward slash (/) in the base URL.

You can set a base path that is unique for each custom field. This base path can be assigned in the *Hotspot Wizard* or using the *Attach Hotspot* dialog accessed in the Custom Field Properties dialog.

1. Open the Hotspot Wizard by clicking on the component where you want to place the hotspot and select **Tools** in the Main menu then **Hotspot Wizard** from the options list.

   You can also click on the Hotspot button  in the toolbar.
2. The *Hotspot Wizard* opens. Click **Next**.
3. Select the **Specify a base path that is unique to this field** radio button, and type or **Browse** to the base path you want to use for this custom field.

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4. You can also accept the default selection, Use the chart's global hotspot base path, and type or **Browse** to the common path to the hotspots in your chart. See the samples above for the correct format.
5. Click **Next** and continue following the wizard dialogs.

   -or-

1. In the *Photo Wizard*, type or **Browse** to the file name of the photo in the **Photo file name** field.
2. Type or **Browse** to the common path to the photos in your chart in the **Base photo file path or URL** field. See the URL samples in Setting a Base URL for the correct format.
3. Click **Next**. If the photo preview is correct, click Finish. If the photo preview does not show the correct photo, click **Back** and retype or **Browse** to the correct path or URL.

Using the Define Dialog

The *Define* dialog contains two tabs, one for **Positions** and the other for Hotspots.

When building from data, this information is fed into field **4** in the OrgPublisher Input File. You must define certain values when you create a position type.

Value	Definition
Priority	Determines where your custom position types will be placed within a box in relationship to other position types. The lower the priority number, the higher it is placed in the box. OrgPublisher automatically assigns this number, but you can change it from the *Define* dialog.
Count	Determines if the position type is counted in head counts. The default is Yes.
Box type	Determines the type of box that is inserted for this position type. Each box type has a different position within the chart. For example, the first assistant box is placed below and to the right of the box to which it reports. If there is more than one assistant, the boxes alternate from right to left below the box to which it reports. Values include: **Normal Box**, **Assistant Box**, **Partner Box**, and **Staff Function Box**

To define a new position type:

1. Select **Edit** from the menu bar, then **Define** from the pull-down menu. The *Define* dialog opens.
2. To create a new position type, click **New**. The last row in the table displays a new position with default information.
3. Highlight the text in the field **Position type** and type the new name. This name is not displayed in the chart, but should be something meaningful to you.
4. You can accept the default or press the **TAB** key to move to the Count column and choose whether or not this position will be counted in the head count roll-up.
5. You can accept the default or press the **TAB** key to move to the Priority column and select the position priority number.
6. You can accept the default or press the **TAB** key to move to the Record type column and select the record type for the position.

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7. Press the **TAB** key to move to the **Group** column. Click in the field and select a group from the drop-down list.
8. You can accept the default or press the **TAB** key to move to the **Box type** column and select the chart box type.
9. Click **Move Up** or **Move Down** to reposition the position type in the dialog. (This does not affect the order of position types in the chart boxes.)
10. Click **OK**. The *Define* dialog closes and the file is saved. If this is a new file, you will be prompted to save the file before you can continue.

To modify an existing position type:

Select the **Position type** name, and follow Steps 3 - 10.

Note: When using conditional formatting, it is best to assign a single attribute group to an appropriately named position type, such as "High Performing Managers."

To set a Hotspot URL

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens.
2. Click the **Hotspots** tab.
3. Type the **Base Hotspot URL or path** name. The base URL is the lowest level of the path to the directory where the linked document is saved. Setting the base URL helps you avoid passing in extra or repetitive data.
4. Or, you may want to type the **Web browser Target frame name**, if applicable. If you use HTML frames to display the results of all your hotspots, specify the target HTML frame name. If you are not using HTML frames, then accept the **default _parent**.
5. Click **OK**. The *Define* dialog closes and the file is saved.

Accessing Smart Links

End users can select from multiple hotspots attached to a single field. When the end user clicks on a custom field, a list displays the names of all the hotspots attached to that particular field. This feature enables end users to access multiple applications or web pages from within a chart.

Access Smart Links from the published chart

1. In the PluginX, or the published chart, place the cursor over a field, such as a name, job, or department. If there is a link, or hotspot attached to the field, the cursor changes.
2. Click on the field. A list of the hotspots, or Smart Links, attached to that field appears.
3. Click on the link you want. OrgPublisher opens the appropriate web page, document, or e-mail client.

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Wizards Overview

The *Wizard View* displays buttons that open a wizard to perform OrgPublisher tasks, although some wizards do not display in this view. The *Wizard View* defaults to the left side of the window, but you can drag it to another location.

Click the Wizard View button  from the toolbar to open this view, or select **View** from the Main menu, then **Wizard View** from the options list. Details on opening a wizard can be found in the Opening a Wizard procedure.

Topics Pertaining to this Section	
Wizard View	Opening a Wizard
9 Box Matrix Wizard	OrgHistory Archive Wizard
Automatic Task Scheduling Wizard	Photo Wizard
Custom Field Wizard	Position Type Wizard
Head Count Wizard	Print Wizard
Hotspot Wizard	Publishing Wizard
Logo Wizard	Style Wizard
New Chart Wizard	Summary Wizard

Wizard View

The *Wizard View* displays buttons that open a wizard to perform OrgPublisher tasks, although some wizards do not display in this view.

Click the Wizard View button  from the toolbar to open this view, or select **View** from the Main menu, then **Wizard View** from the options list.

The *Wizard View* defaults to the left side of the window, but you can drag it to another location.



Figure 91.

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Opening a Wizard

Each OrgPublisher wizard consists of a series of dialogs that guide you through a specific process one step at a time. Some wizards are available from the **Tools** menu or through the Wizard View. Some wizards open another wizard.

You can access a wizard by following the instructions below.

9 Box Matrix Wizard - opens from the **Tools** menu or when you click the 9 Box Matrix  button in the toolbar (the first time you access 9 Box Matrix).

Automatic Task Scheduling Wizard - opens from the *Publishing Wizard* or *OrgHistory Archive Wizard* when you select the **Schedule now** option; also available from the *Publish charts* and *OrgHistory Archives* dialogs.

Custom Field Wizard - opens from the **Tools** menu or the *Wizard View*.

Head count Wizard - opens from the **Tools** menu or the *Wizard View*.

Hotspot Wizard - opens from the **Tools** menu, the *Wizard View*, or by clicking on the Insert Hotspot  button and clicking in a chart box.

Logo Wizard - opens from the **Tools** or **Insert** menu.

New Chart Wizard - opens when you select the New  button in the menu or toolbar, or when you select that radio button when you open OrgPublisher.

OrgHistory Archive Wizard - opens from the *OrgHistory Archives* dialog, which opens by clicking the Manage OrgHistory Archives  button in the Main toolbar, or opens from the **Tools** menu.

Position Type Wizard - opens from the **Tools** menu or the *Wizard View.*

Photo Wizard - opens from the **Insert** menu, or by clicking the Insert Photo  button and clicking in a chart box.

Position Type Wizard – opens from the Tools menu or the *Wizard View*.

Print Wizard - opens the first time you print a chart (using either the **File**, **Print** menu or the Print  button) or every time you print a chart if you choose it in **Print Options** from the **File** menu.

Publishing Wizard - opens from the **Tools** or **File** menu or from the *Wizard View*.

Style Wizard - opens from the **Tools** menu or the *Wizard View*. Also opens from the *New Chart Wizard*.

Summary Wizard - opens from the **Tools** menu or the *Wizard View*.

9 Box Matrix Wizard

Available in OrgPublisher Premier, the *9 Box Matrix Wizard* converts your performance data into a "scorecard" for succession planning.

The wizard walks you through selecting fields for the X-axis (horizontal line) of 3 boxes assessing performance and the Y-axis of 3 boxes (vertical line) assessing potential.

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A combination of the Y and X axis determines the box within the grid where the employee is placed. The top right-most box displays **High Performance/High Potential** employees, while the bottom left-most box contains **Low Performance/Low Potential**.

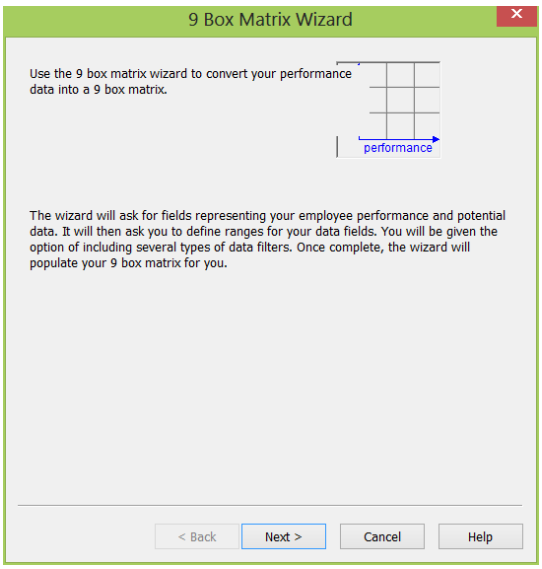

9 Box Matrix Wizard
Use the 9 box matrix wizard to convert your performance data into a 9 box matrix.
performance
The wizard will ask for fields representing your employee performance and potential data. It will then ask you to define ranges for your data fields. You will be given the option of including several types of data filters. Once complete, the wizard will populate your 9 box matrix for you.
< Back
Next >
Cancel
Help

Figure 92.

In addition to the fields you want to use for analysis, you can also select group and position type filters, range limits, and sort order.

Note: Records displayed in the *9 Box Matrix* are associated with the level displayed in the *Chart View*.

Automatic Task Scheduling Wizard

OrgPublisher provides an *Automatic Task Scheduling Wizard* which enables you to schedule a chart to automatically publish or archive at the selected frequency. You can create a new schedule definition or select from a list of existing definitions.

Task scheduling is accessed when you choose the Schedule now option in either the Publishing Wizard or the OrgHistory Archive Wizard.

With the OrgPublisher Automatic Task Scheduling Wizard you can schedule a job to run:

- One time only
- Daily
- Weekly
- Monthly

User ID for Automatic Task Scheduler

- When scheduling a publishing or archive task, the OrgPublisher Automatic Task Scheduler wizard presents a dialog user name and password. Depending on your company's operating system requirements, you may be able to bypass this dialog without typing the asked for information.

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- If you are using Microsoft® Windows®, the User ID dialog prompts you to type a valid user name and password in order to automatically publish or archive your chart. You must be an authorized user of Windows® to publish or archive your charts through this scheduling wizard.

Custom Field Wizard

The OrgPublisher *Custom Field Wizard* walks you through the process of manually creating or modifying custom fields in your chart for your organization's data.

Custom fields added below box titles contain information pertinent to the whole department or team that the box represents. Custom fields added below a Job title contain information about that job. Custom fields added below a person contain specific information about that person or the position they hold.

> **Note:** When working with planning charts, planners can modify any data fields displayed in the *Chart View*. Data fields that you, the administrator, want to keep in the chart but do not want modified, can be displayed in the *Profile View*. And since planners cannot add or delete custom fields, you still maintain control over the custom fields you decide to use in the chart.

To create or modify a custom field using the *Custom Field Wizard*:

> **Note:** If you manually create a custom field and you do not update your HR database, the next time your chart is refreshed, your data will overwrite your manual changes.

1. Select **Tools** from the Main menu then **Custom field Wizard** from the pull-down menu.
2. The first time you create a custom field for your chart, the dialog prompts you to select the **Type** of custom field you want. For instance, select **E-mail** if you are setting up a group e-mail list.

   To display numeric information like sales and expenses in OrgPublisher Premier, you insert numeric custom fields.

   Click **Next**.
3. If custom fields already exist in your chart, select either the **New Custom field** or **Existing Custom field** radio button. Click **Next**.
4. Type the **Label**, or name, for the custom field. Select the **Hide label** check box if you do not want the label to display in the chart. Click **Next**.
5. Click on the **Position Type** to display the custom field in your chart, such as **All Positions** or **Manager**. Select where you want to assign the field, box, job, or name. Click **Next**.
6. Click **Finish**. The custom field displays in your chart.

When comparing charts, new or renamed custom fields will not match when comparing charts and will not be included in the change report. In addition, if the charts you are comparing do not contain a custom Position ID type, OrgPublisher uses the ID in field 5 from the Input File Layout. If neither exist, an error message displays and the comparison does not occur.

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Head Count Wizard

OrgPublisher can automatically calculate and display head counts in your org chart. Only those position types set as "counted" will be included in chart box head counts. Counts can be displayed in both the chart and the Summary view.

Head counts and head count roll-ups

OrgPublisher provides two types of head counts in addition to a head count roll-up. These features count position types that have the **Count** set to **Yes**. Head counts are different from head count roll-ups, which are based on a counted position type or total population for each manager, department, district, region, etc.

- **Total head count** - The counted "filled" positions in an org chart, indirect reports are normally not counted.
- **Total planned head count** - The counted "filled" and "open" positions in an org chart, indirect reports are normally not counted.
- **Head count Roll-up** - A count of positions reporting to a specific manager or area within an org chart.

Head counts are displayed in the Status bar at the bottom of the window. The starting point of a head count is always based on the top most point in the chart that is displayed in the Chart View.

Position types displayed in the Summary View can be excluded from the total head count, but included as an individual position type head count.

To insert a Head count:

1. Select **Tools** then **Head count Wizard** from the pull-down list. The Head Count Wizard opens. Click **Next**.
2. Select a **Population** for the head count from the drop-down list. **Total Head Count** is the default selection.
3. Select the **Accumulation** method, **Direct Count**, **Hierarchy**, or **Level**. Click **Next**.
4. Type a Label for the head count field.
5. If applicable, select the **Hide label** check box. Click **Next**.
6. Select the **Position type** to display the head count field, or choose **All Position Types**. Click **Next**.
7. Click **Back** to edit your choices. Click **Finish** to complete the wizard and display the head count in your chart.

Hotspot Wizard

OrgPublisher provides a *Hotspot Wizard* to help you create or modify hotspot links in the *Chart View*, *Profile View*, and the *Hover Profile*. These links can point to locations on the Internet, your intranet, or your server. You can also specify a base path for each hotspot rather than a global base path.

Note: Do not use this wizard if you want to set up a hotspot email link. Use the Custom Field Properties dialog to assign the Email custom field type.

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To add a hotspot:

1. Click the Insert a Hotspot button  in toolbar and click on a field in a chart box to open the *Hotspot Wizard*.
2. To create a new hotspot, select the **New Hotspot field** button. To modify an existing hotspot, select the desired hotspot from the **Existing Hotspot field** list.
3. Accept the default **Use the chart's global hotspot base path** option or select the **Specify a base path that is unique to this field** radio button. If you select the latter option, type the lowest level of the path to the directory where the linked document is saved, such as file://servername/profiles. Setting the base URL helps you avoid passing in extra or repetitive data. Click **Next**.

   Note: You can also specify a base path for hotspots when using the Publishing Wizard.
4. If you use HTML frames to display the results of a hotspot, type the **Target frame name**. If you are not using HTML frames, then accept the default, **_parent**. Click **Next**.
5. Select the **Position type** to display the hotspot, such as **All Position Types**.
6. Select the field where you want the hotspot shown, such as **Job Title**. Click **Next**.
7. Review the information you have selected, the label, base URL, and target frame. Click **Back** if you need to modify data. If the fields are correct, click **Finish**.

Logo Wizard

The OrgPublisher *Logo Wizard* walks you through adding or modifying the URL for a logo in your org chart. You can also insert a graphic as a watermark or background using the *Format* dialog.

Note: The Logo Wizard inserts one logo per chart across all styles.

To insert a logo:

1. Select **Insert** from the main menu, then **Logo** from the options list. You can also select **Tools**, then **Logo Wizard**. If you are modifying an existing logo, right-click on the logo. The *Logo Wizard* opens.
2. Type or **Browse** to the **Logo file name**. Click **Next**.
3. If you are deleting a logo, just delete the file name from this field. Click **Next** and then proceed to Step 6.
4. Select the alignment you want for your logo from the drop-down **Alignment** list.

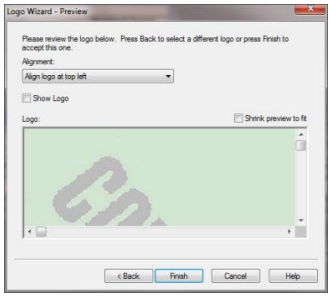


Figure 93.

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5. Select the **Show Logo** check box if you want the logo displayed. (You may create styles that do not display the logo.) A preview of the logo is shown.
6. If the logo is too large to see in the preview pane, you can select the **Shrink to fit** check box.
7. Click **Back** if you need to change the logo or graphic. If the logo is correct, click **Finish**.

Logos are not supported when publishing as an EChart thin client.

New Chart Wizard

OrgPublisher provides a wizard to help you begin creating a new chart. The *New Chart Wizard* can also launch the Style Wizard to help you create your first style.

> **Note:** Use the ODBC, or Database, option to publish a chart in real-time. If you are creating an ODBC connection for Unifi Thin Client, refer to the Unifi Installation and Configuration Guide provided by the PeopleFluent Professional Services Group.

Real-time publishing is not available when building a chart from multiple data sources.

1. Open OrgPublisher and select **Run the New Chart Wizard** radio button from the OrgPublisher dialog.

   You can also click the New button  in the toolbar. The *New Chart Wizard* opens.
2. Select either the **Organizational chart** or **Organizational chart using Prebuilt Reports** radio button then click **Next**. The *New Chart Wizard* displays a dialog for you to select the source of your data.
3. If you select the Prebuilt Reports option, see the Prebuilt Reports - Create a New Report topic for detailed information.
4. Select the button that indicates where you want to get data and click **Next**.

Click on a data source option below to access the procedure you need to create an org chart.

ODBC file

XML File

Text file

Multiple data sources

Blank Chart

UNICODE File

Choosing Standard or Custom Field Order

5. Follow the wizard prompts for the data source you selected.

   Detailed information about the input fields can be found in the Input File Layout and Input File Layout Rules sections of this document.

> **Note:** If you are connecting to a Microsoft Excel file, you must create a named range identifying where the data is located within the spreadsheet.

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6. Select the **Launch the Style Wizard** check box if you want to format a style. Click **Finish**. The Style Wizard opens.

OrgHistory Archive Wizard

With OrgPublisher you can use the *OrgHistory Archive Wizard* to take a "snapshot" of your organizational chart and archive it for reference at a later time. The wizard walks you through selecting a directory and name for your archive, as well as helps you assign a password or add a signature to the archive.

> **Note:** You can create a "read-only" archived chart just once a day (using the one time only option). If you want to archive an updated version of your "read-only" chart, you can schedule it to run the next day. A "read-only" archived chart can be overwritten with an updated version of the same chart. A message verifies that the end user wants to overwrite the "read-only" archive.

To add an archive schedule:

1. Click the Manage OrgHistory Archives  button in the toolbar. The *OrgHistory Archives* dialog opens.
2. Click on the **Archive Schedule** tab.
3. Click **New**. The *OrgPublisher Automatic Task Scheduling Wizard* opens. Click **Next**.
4. Type the archive schedule name in the **Name** field or accept the default name displayed. The schedule name can be the same name as the archive definition, if you want. Click **Next**.
5. Select the archive definition you want to schedule. Click **Next**.

   If you choose to have more than one schedule, make sure that you set up enough time for each schedule to complete before the next one begins.
6. Select a radio button for your publishing schedule. Click **Next**.
7. If you selected **One time only**, the *Schedule Once* dialog asks you to select a time of day and a date to automatically archive your chart.
   - If you selected **Daily**, the *Daily Schedule* dialog asks you to select a day to automatically archive your chart. For example, if you want your chart to archive **Every weekday**, you select that radio button. If you want your chart to archive every other day, you select **2** in the **Every** field. Then you set the time and actual date to begin automatically archiving your chart.
   - If you selected **Weekly**, the *Weekly Schedule* dialog asks you to select a weekly frequency in the **Every** field, such as **1** for every week, or **2** for every two weeks. Then you must enter the time and the day of the week to automatically archive your chart, such as **Sunday**. Your chart can be archived on more than one day of the week.
   - If you selected **Monthly**, the *Monthly Schedule* dialog asks you to select a day, such as **Day 1**, or the **First Monday** of the month to automatically archive your chart. Then you select the time and the specific months that you want your chart archived.

   Click **Next**.

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> **Note:** Your machine must be turned on and the chart closed in order to archive.

8. Depending on your company operating system requirements, you may be able to bypass this dialog without typing the asked for information. If you are using Microsoft® Windows®, the *User ID* dialog prompts you to type a valid user name and password in order to automatically archive your chart. You must be an authorized user of Windows® to archive your charts using the scheduler wizard. Click **Next**.
9. The *Scheduling* dialog displays a recap of your archive selections. If the information is correct, click **Finish**. If you need to modify information, click **Back** until you reach the appropriate dialog and repeat steps above to complete your scheduling.

> **Note:** If you are working with the OrgPublisher Web Administration server, all archived charts will be created in the server **ArchivedCharts** folder. In addition, if end users must access archived charts, they must be stored in the **SourceCharts** folder.

Photo Wizard

The OrgPublisher *Photo Wizard* walks you through the process of inserting or modifying the URL for photos or graphics in your chart.

To insert a photo:

1. Right-click on a name if you are working with a planning chart and select **Photo Wizard** from the options list. Select **Insert** from the menu bar, then **Photo** from the pull-down menu. The *Photo Wizard* opens. If you are working with a chart from data, place the photo file name, for example, jasmith.jpg, in field 15 of the input file.

   You can also click the Insert Photo button  on the Insert toolbar and click in the box where you want to add the photo. The *Photo Wizard* opens.
2. Type or **Browse** to the **Photo file name**.
3. If applicable, type or **Browse** to the **Base photo file path or URL**.

   If you browsed to the photo file name, the base path automatically displays in this field. The base file path or URL is the lowest level of the path to the directory where the linked document is saved, such as file://servername/profiles/.

   If applicable, you can select the **Photos located in the same folder as chart** check box. Click **Next**.

   > **Note:** If a full path is passed in with a photo file in field 15, the base URL is overridden and the full path name is used. You must include the trailing forward slash (/) in the base URL.
4. A preview of the photo is shown in the last dialog. If the photo is correct, click **Finish**. OrgPublisher inserts the photo or graphic into your org chart. Click **Back** if you need to change the photo or graphic, then repeat these steps and click **Finish**. The photo displays in the selected box.
5. If necessary, resize the photo by adjusting the **Width** or **Height**. As you adjust one dimension, the other automatically changes to maintain the aspect ratio.
6. If you are not satisfied with the new size, click **Reset to actual size** and begin again.
7. If you are using very large photos, you can select the **Shrink preview to fit** check box.

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8. Click **Finish**.

   A message displays asking if you want to make the size of the selected photos the default size for all photos in the chart. Click **Yes** for best results.

Position Type Wizard

You can add or modify a position type using the *Position Type Wizard*.

1. Select **Tools** from the Main menu then **Position Type Wizard** from the pull-down menu.
2. Accept the default of **New Position Type**, or select **Existing Position Type** to choose one of the standard OrgPublisher types. Click **Next**.
3. Type the **Position Type name**.
4. If applicable, select a **Group** to assign conditional formatting, as long as it is not a secured group. Click **Next**.
5. Accept the default selection of **Yes** to add the position type to the head count, or select **No**. Click **Next**.
6. If applicable, type the custom **Record Type**.
7. If applicable, select a **Box Style and Color**. (Option not available when using Prebuilt Reports.)
8. If applicable, select the **Text Style and Color**. (Option not available when using Prebuilt Reports.)
9. Click **Next**. Click **Finish**.

Print Wizard

OrgPublisher provides a *Print Wizard* to help you with the page setup for your printed chart. You can print a chart in either a book or wall chart format.

The **Wall Chart** option is ideal for smaller charts that fit on one page, or when printing to a plotter. The **Book Style** option can be modified to print a select number of levels per page, specific chart layouts and more, and includes an index.

To print a chart using the *Print Wizard*:

1. Select **File** from the Menu then **Print options** from the options list then **Use Print Wizard**. You can also click the Print  button in the toolbar. The *Print Wizard* opens.
2. Select the **View to print**, such as **Org Chart**. Click **Next**.
3. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**.
4. If you want to add or modify a header or footer for your chart, click **Header/Footer** to open the *Print Header/Footer Options* dialog. Make your selections, as detailed in the Selecting Print Header/Footer Options procedure in this document. Click **OK**.
5. If your chart contains group icons or custom items, you can select the **Include Legend** check box to print a chart legend listing all the icons and colors used in the chart.

   Click **Finish** to print your chart.

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Publishing Wizard

OrgPublisher provides a *Publishing Wizard* to help you create publishing definitions for your chart. You can choose **Express Mode** for a basic PluginX published chart or **Advanced Mode** to select specific options for your published org chart.

Select a publishing format to review the appropriate publishing option procedure.

Express Mode

PluginX

Graphic

HTML

EChart Rich client

OrgPublisher Executive on iPad

Cross browser EChart Thin client or Microsoft Silverlight

Real-time

PDF document

Style Wizard

You can create multiple styles in OrgPublisher for each chart to vary the display of your chart data and to help format your chart. If you publish your charts with OrgPublisher PluginX, your users can switch styles while viewing your chart. With the *Style Wizard*, you can create a new or change an existing style. You can set styles from within the New Chart Wizard, or create styles later in the chart process.

Note: Applying a chart design template overwrites any Advanced Box Layout settings you may already have in your chart.

To add a style:

Note: You can also select a style from the Chart Design Template using the *Style Wizard* or by clicking the Chart Design Templates button  in the toolbar.

1. Select **Tools** from the main menu and **Style Wizard** from the pull-down list. The *Style Wizard* opens. Click **Next**.
2. Select the radio button to either edit an **Existing Style** or create a **New Style**. Click **Next**.
3. Type a **Style name** or accept the displayed default.
4. Select the radio button to choose the method of creating the style, **Use this wizard to create a new style** or **Make a copy of an existing style**. Click **Next**.

   If you selected to make a copy of an existing style, proceed to Step 7.
5. If you selected to create a new style, select a method to format your chart, **Selecting a chart design template** or **Using the wizard**. Click **Next**. If you select the chart design template option, proceed to Step 14.

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6. Choose a radio button for the chart layout you want to use. Click **Next**.
7. Select the radio button for how you want reports displayed in each box, **Report each person on his/her own box**, **Report each person in box with manager**, or **Report each person in the same box below manager**. Click **Next**.
8. Select the position types you want to show or hide in the style. A green check mark indicates a shown position type. A red **X** indicates a hidden position type. Click **Next**.
9. Select a radio button to use the **Automatic** chart title or to create a **Custom Title**. If you choose to use a custom title, type the name in that field. Click **Next**.
10. Select the **Levels to Display** in the chart. OrgPublisher defaults to "2 levels." Click the down-arrow to modify the default.
11. Select the check box to **Enable Drill-up/Drill-down buttons**, or clear it to hide the drill buttons. Click **Next**.
12. Select the check box next to each view you want to display in the chart. Click **Next** and proceed to Step 15.
13. If you selected the chart design template option in Step 6, the next dialog displays thumbnails of preformatted window layout templates available. Select the format you want then click **Next**.
14. Select the thumbnail that resembles the *Chart View* you want to see in your chart. Click **Next**.
15. You can click **Back** in order to modify any of your choices, or click **Finish** to close the wizard and open your chart in this style.

Summary Wizard

The *Summary Wizard* in OrgPublisher Premier walks you through the process of creating summary fields in your chart for numeric data. You can use summary information for reports or what-if planning. You can select how much of this information displays in the *Summary View*.

Summary fields can include:

- Head counts
- Summaries of numeric data, such as totals, averages, minimum, maximum, or percentages
- Projections that you create in a separate planning session
- Group counts

The *Summary Wizard* prompts you for the custom field to summarize, the type of summary, the population for the summary, the name or label you want to assign to the summary, and which position types should display the summary.

Note: The *Summary View* is not available in published real-time charts. Succession candidates are not included in head counts or summaries.

The *Summary Wizard* informs you if your chart does not contain numeric custom fields and, subsequently, closes.

When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to

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importing those fields into OrgPublisher, as they cannot be adjusted after they are imported.

Adding a Summary Field

1. Select **Tools** from the Main menu, then **Summary Wizard** from the pull-down menu. The *Summary Wizard* opens to the first dialog. Click **Next**.

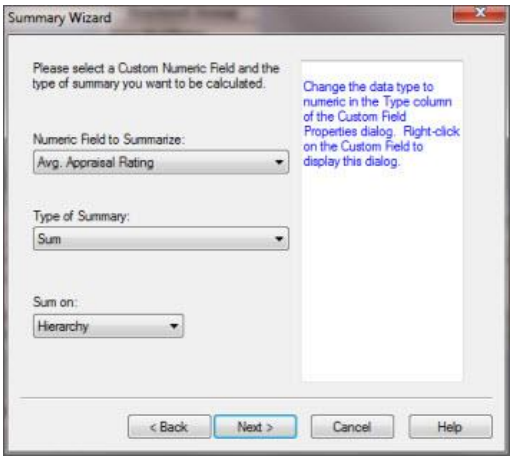

Summary Wizard
Please select a Custom Numeric Field and the type of summary you want to be calculated.
Change the data type to numeric in the Type column of the Custom Field Properties dialog. Right-click on the Custom Field to display this dialog.
Numeric Field to Summarize:
Avg. Appraisal Rating
Type of Summary:
Sum
Sum on:
Hierarchy
< Back
Next >
Cancel
Help

Figure 94.

Select the existing **Numeric Field to Summarize** from the drop-down list.

2. Select the **Type of Summary** from the drop-down list.
3. Click the down-arrow in the **Sum on** field and select either **Hierarchy** or **Level** on which to base the summary. Click **Next**.
4. Select the **Population** to include the summary total. You can select the position types, total head count, or planned head count to be included in your calculation. Click **Next**.
5. Type the **Label**, or name, for the summary field. Select the **Hide label** check box if you do not want the label to display in the chart. Click **Next**.
6. Click on the position type to display the summary. Select where in the position type you want the field displayed. Repeat for each position type. You can also select **All Positions**. Click **Next**.
7. Click **Finish**. The summary field displays in your chart.

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Formatting Charts

After you create your chart you can apply specific formatting features to enhance the visual effectiveness of your chart.

Topics Pertaining to this Section	
Advanced Formatting	Legends
Custom Fields	Photos, Icons, and Logos
Hover Profiles	Styles
Format Dialog	

Formatting the Search Dialog

You can format the Search dialog to match the field types in your org chart by:

- altering the tab or field labels
- changing the operation between modal and non-modal; either keeping the focus on the Search dialog while it is open or letting the focus switch between the dialog and the chart window
- hiding or reordering search tabs
- select focus or succession planning options

1. Select **Options** from the menu bar, then **Search Options** from the pull-down menu and **Customize Search dialog** from the options list. The *Customize Search Dialog* opens.

   There are four columns in the *Search* dialog.

Column Name	Description
Search Page	Lists the type of information contained in each tab.
Tab Caption	Lists the current name of the selected tab.
Field label	Lists the names of the fields within each tab.
Hide	Indicates whether the tab is shown or hidden.

2. Click the tab name in the **Tab Caption** column that you want to change.
3. Type the name that you want over the old name and press **Enter**.
4. Repeat the process for each **Tab Caption** or **Field label** you want to change.
5. To change the sequence of the tabs, highlight the tab record line that you want to move and click **Move Up** or **Move Down**.
6. If you want the *Search* dialog to always be active while it is open, verify that the **Keep focus on Search dialog (Modal)** check box is selected. In other words, you have to close the Search dialog before you can perform a task in OrgPublisher or the published chart.
7. If you want to create a succession planning chart and search for succession candidates, select the **Enable succession planning features** check box. Clear the check box to disable this feature.
8. Click **OK** to accept your change.

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9. If you want to use the original tab and field names, click **Restore Default** and click **OK**. This option immediately restores all default headings.

Hover Profiles

The *Hover Profile* is a quick way to view the most important employee information without opening the *Profile View*. The pop-up profile is anchored to the upper right or, depending on the location in the *Chart View*, the upper left, of the data element (box title, job title, or name) that the mouse is over. The *Hover Profile* is not the same as the *Profile View*. Modifications made in one place are not reflected in the other.

The *Hover Profile* is style-specific and is available in *View Mode* or published chart only. The *Hover Profile* defaults to **off**. End users can access it if you publish a chart with the *Hover Profile* enabled.

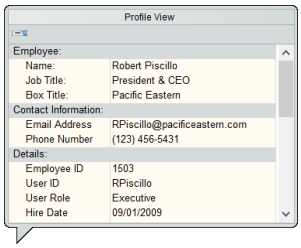


Figure 95.

Resizing the Hover Profile

You can resize the *Hover Profile* using the *Show/Hide* dialog. The *Hover Profile* is style-specific, and end users can access it if you publish a chart with the *Hover Profile* enabled.

> **Note:** The *Profile View* is not the same as the *Hover Profile*. Modifications made in one place are not reflected in the other.

1. Hover the mouse cursor over the chart component, person, job, or box, for which you want to resize the *Hover Profile*. When the profile appears, right-click on a field and select **Show/Hide fields** from the options list. The *Show/Hide* dialog opens.
2. In the **Popup View Size** portion of the dialog, use the up or down-arrows to select the pixel size you want for the **Width** and **Height**. You can also type a size between 80 and 600 pixels.
3. Click **OK** to close the dialog and accept the changes. Hover over the data element, box title, job title, or name, again and the *Hover Profile* opens to the new size. All profiles for the same component (person, job, or box) throughout the chart reflect this change.

Showing or Hiding Fields in the Hover Profile

1. Right-click on a field in the Hover Profile and select **Show/Hide fields** from the drop-down list. The Show/hide fields dialog opens at the **Person** tab.
2. Select the tab where you want to modify the fields, **Person**, **Job**, or **Box** then select the check box for the field or subheading you want to show or hide. A check indicates the field is displayed. A blank box indicates that the field is hidden.

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3. You can also rearrange the position of each field, or arrange fields to display beneath a subheading, by clicking the **Move Up** and **Move Down** buttons.

   Click **OK** to close the dialog. The *Hover Profile* reflects the changes.

Viewing the Hover Profile

1. Move the mouse cursor over a box title, job title, or name in a chart box, and let it hover there for a few seconds. The Hover Profile opens.

   A vertical scroll bar is available if the number of displayed fields requires it. The *Hover Profile* displays the selected chart color scheme.

2. When you have finished reviewing the information in the *Hover Profile*, click somewhere else in the chart to close it.

Viewing the Matrix Reporting Hover Display

If you enable the *Hover Profile*, you can also enable the Matrix Reporting hover display.

1. Open a chart that contains multiple relationships/matrix reporting icons.
2. Move the cursor over the matrix reporting icon in a box. The Matrix reporting hover display appears, listing that person and all report to instances.
3. You can move the cursor to close the hover display, or you can pin the matrix reporting hover display to the *Search View* by clicking the Pin button .

Viewing the Tabbed Hover Profile

If you have created subheadings in the Hover View you, as well as the end user of a published chart, have the option to display the information with tabs representing each subheading. The chart administrator sets the default display for the published chart.

1. Open the *Hover View* and add subheadings if they do not currently exist.
2. Right-click inside the view and select **Configure Profile View**.

   The *Configure Profile View* dialog opens.

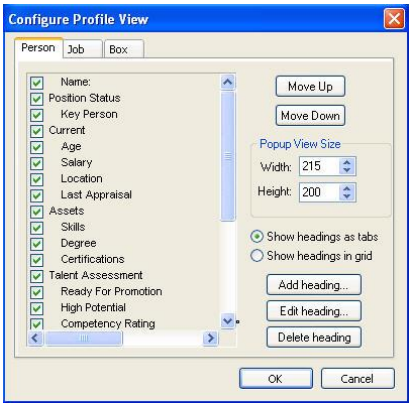


Figure 96.

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3. Select the **Show headings as tabs** radio button.
4. Click **OK**. The dialog closes and the *Hover Profile* displays the subheadings as tab options.

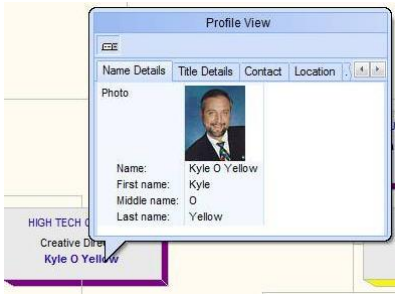


Figure 97.

5. Select a tab to view the subheading and associated data.
6. Click the **Enable/disable tabbed category view** button to remove tabs and view the grid.

Group Icon Chart Legends

The chart legend allows the chart administrator and planners to not only display a list of group icons, but to also create and describe custom colors used in the chart. The legend helps end users understand what the icons and colors mean.

When you first enable the legend, all group icons are automatically placed within the legend.

You can quickly turn the legend on or off by using the toolbar Legend Properties button, or you can open the *Chart Legend Properties* dialog. The settings you select for the legend are applied to the current style.

Note: Depending on where you place the legend, some boxes in the chart may be covered. You may want to modify the legend settings to better fit the legend within a blank area of the *Chart View*.

Formatting the Chart Legend

You can format the chart legend to better fit your chart scheme.

The legend default uses:

- a 1 column list
- a width of 200 pixels
- a height that is automatically calculated to fit the number of items in the legend

To change the format of the chart legend:

1. Open the chart legend by clicking the Legend Properties button in the toolbar or by selecting **Insert** from the Main menu then **Legend** from the options list. If the legend is already displayed in the chart, you can also click on the legend to open it. The *Chart Legend* dialog opens at the **Placement** tab.

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2. Select the **Formatting** tab. This tab provides options for outline style, color, gradient, and dimensions, as well as a preview section.
3. In the **Format** section, select the **Outline style** you want to use by scrolling through the available options and clicking on the one you want.
4. Accept the default to **Show outline** for the legend, or clear the check box if you do not want to display the outline.
5. Select the **Outline width** using the up or down-arrow. The allowed range is between 1 - 5 pixels.
6. In the **Use Custom Dimensions** section, select the check box if you want to the legend to be a different size. Using the up and down-arrows for each field, select the **Box width** (range **40 - 999**), **Box height** (range **40 - 999**), **Number of columns** (**1 - 20**), and **Column wrap style**.
7. In the **Color** section, use the pull-down options in each field to select the **Background color**, **Gradient color**, **Gradient style**, **Shadow color**, and **Outline color**.
8. The **Preview** section to the right of the dialog provides a sample of what the legend looks like as you make each change. When you get the format you want, click **OK** to accept the changes and close the dialog.

Aligning the Chart Legend

When you enable the chart legend in your chart, you can select the placement of the legend, format the legend, and select the contents of the legend. You can also add or modify custom items in the chart legend.

You can also publish a legend with Cross Browser/Silverlight charts. Whichever corner is chosen for the placement, the legend remains in that corner as you scroll up or down within the chart window.

Note: Chart legends can be activated when still empty, but the legend will not display in the chart until icons have been entered.

1. Open the chart legend by clicking the Chart Legend Properties  button in the toolbar or by selecting **Insert** from the menu then **Legend** from the options list. If the legend is already displayed in the chart, you can also click on the legend to open it.
2. Select the **Show legend** check box in the **Placement** tab.

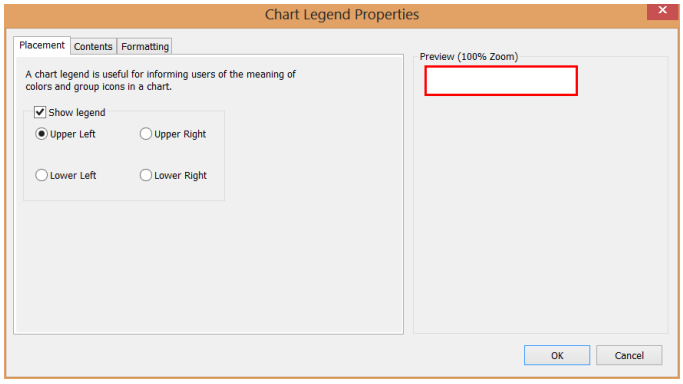


Figure 98.

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The *Chart Legend Properties* dialog is now enabled, and the **Contents** and **Formatting** tabs are available.

3. Select the radio button to place the legend in one of the four corners of your chart, **Upper Left**, **Lower Left**, **Upper Right**, or **Lower Right**.
4. If you want to accept the default to display all current icons in the legend, as well as the default legend format, click **OK** to close the dialog. The legend displays in the *Chart View* in the selected corner.
5. You can also select or add the contents of the chart legend or format the chart legend to fit better with your chart properties.

Selecting the Contents of the Chart Legend

When you enable the chart legend in your chart, you can select the placement of the legend, format the legend, and select the contents of the legend. You can also add or modify custom items in the chart legend.

1. Click on the legend in the *Chart View*. You can also click the Legend Properties button  in the toolbar.

   The *Chart Legend Properties* dialog opens.

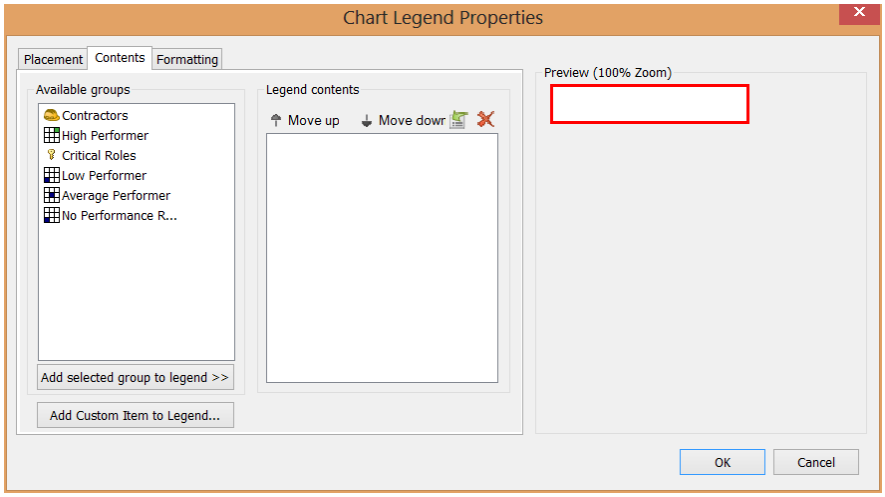


Figure 99.

2. Select the **Contents** tab.

   When opening the *Chart Legend Properties* for the first time, all icons in the chart are displayed in the legend. These icons are listed in the **Legend contents** section of the dialog. As you create new groups with icons or custom items, they display in the **Available groups** section of the dialog. The **Preview** section shows you what the legend currently looks like.
3. Select a group or custom item from the **Available groups** section and click **Add selected group to legend**. The selected icon moves to the **Legend contents** section, and you can see it in the **Preview** section.

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4. Click **Move up** or **Move down** to change the sequence of the list in the **Legend contents** section.
5. Click Remove an icon button to remove a group icon from the contents area and move it to the **Available groups** section.
6. Click **Add Custom Item to Legend** to add an additional custom color to the legend. When you add the new icon to the contents section, double-click on the item to enable the Set icon properties button. Click the button to **Modify Icon Properties**. You can also delete a custom color icon with the Remove an icon button.

   Note: When you delete a custom icon, it is immediately discarded. The icon and color information is not saved.
7. Click **OK** to accept the changes and close the dialog.

Adding a Custom Item to the Chart Legend

When you enable the chart legend in your chart, you can select the placement of the legend, format the legend, and select the contents of the legend. You can also add custom item color and gradient icons to include in the legend.

1. Click on the legend in the *Chart View*. You can also click the Legend Properties button in the toolbar. If the legend is already displayed in the chart, you can also click on the legend to open it. The *Chart Legend Properties* dialog opens.
2. Click the **Contents** tab.

   When opening the *Chart Legend Properties* for the first time, all icons in the chart are displayed in the legend. These icons are listed in the **Legend contents** section of the dialog. As you create new groups with icons or custom items, they display in the **Available groups** section of the dialog. The **Preview** section shows you what the legend currently looks like.

   In addition, it's best not to give custom items the same names as groups. Custom legend items and groups that have the same name do not synch.
3. Click **Add Custom Item to Legend**. The *Add New Custom Item* dialog opens.
4. Type the **Label** for the new icon, limited to 64 characters.
5. Select a **Color** using the down-arrow to open the color grid.
6. If applicable, select the **Gradient style** using the down-arrow to select a gradient style thumbnail.
7. If applicable, select the **Gradient color** using the down-arrow to open the color grid.
8. Click **Add**. The new icon is automatically added to the **Legend contents** section of the dialog.

Modifying Icon Properties

1. Select the custom item icon in the **Legend contents** tab to enable the Properties button. You can modify custom legend icon properties only. Properties for a group icon can be modified only in the Group Editor dialog.

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2. Click the Properties button to open the *Modify Icon Properties* dialog.
3. Modify the custom icon settings as needed, **Label**, **Color**, **Gradient style**, and **Gradient color**.
4. Click **OK** to accept the changes and close the dialog. The modified icon displays in the **Legend contents** and **Preview** sections of the dialog.

Printing a Chart Legend

If you use several group or custom icons in your chart, you can choose to print a chart legend when you print your chart using the Print Wizard or the Print Preview.

Note: The chart legend does not display in the *Book Style Print Preview*. It does, however, print when you print the chart in book style.

1. Open the *Print Wizard* by clicking on the Print button or, if you have turned off the Print Wizard option, select **File** from the main menu, then **Print Options** from the pull-down list and **Use Print Wizard** from the options list.
2. Follow the wizard dialogs to print either in Wall chart or Book style.
3. The last dialog enables you to choose header or footer options. If you select the **Include Legend** check box, your printed chart includes the legend on each page of your chart.
4. Click **Finish** to close the wizard and print your chart.

If you are using the *Print Preview* option and you have defined and enabled a legend, you can use the Add or remove legend button in the preview and select the **Include Legend** check box in the *Settings* dialog of the Book style preview.

The legend prints on one page in Wall style and on every page in Book style. You may need to make adjustments in your chart for the size of the legend so that it does not print over boxes.

Photos, Icons, and Logos

You can configure your org chart and reports using employee photos, meaningful icons for groups, and a company logo.

Topics pertaining to this section include:

Topics Pertaining to this Section	
Adding a Group Icon	Inserting Photos
Adding Multi-reporting Relationships Icons	Photo Wizard
Attaching or Removing Groups Icons in Styles	Resizing Photos in the Chart
Groups and Multi-reporting Relationships Icons	Resizing Wizard Icons
Inserting Logos	

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Inserting Photos

You can insert photos in your chart boxes in the *Chart View* or *Profile View*. You can also insert graphics into your chart the same way as photos. The accepted file formats are GIF, JPG, TGA, PCX, and DIB.

Before you insert any photos or graphics, you should:

- Move all of your picture files into one directory. By keeping all of your photos in one directory, you can type the base URL or path for photos in the field, **Base photo file path or URL** in the *Photo Wizard*, and it is saved for future photo insertions.
- Set a default size for your photos. If you insert a photo that is larger than the chart box, the box automatically widens to fit the photo. The width of a chart box is the same for all boxes in the chart, which means that all of the boxes in the chart change to the same width as the box with the photo.
- Once you have moved all of your photos and graphics to the same directory and have modified them to be the same size, run the Photo Wizard.

Resizing Photos in the Chart

Using the Photo Wizard, you can resize the photos in your chart at any time.

1. Double-click on a photo in your chart.

   The *Photo Wizard* opens to display the file name and path. Click **Next**.

2. Type the new size or use the up and down arrows to adjust the **Width** or **Height**. As you adjust one dimension, the other automatically changes to maintain the aspect ratio.
3. If you are not satisfied with the new size, click **Reset to actual size** and begin again.
4. If you are using very large photos, you can select the **Shrink preview to fit** check box. This will not change the actual size of the large photos in the chart.
5. Click **Finish**.

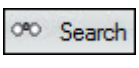
   A message displays asking if you want to make the size of the selected photos the default size for all photos in the chart. Click **Yes** for best results.

   All the photos in the chart are redisplayed in the new size.

Adding a Group Icon

You can add an image to display in your chart next to the names of individuals belonging to a selected group. You can use standard 16x16 and 32x32 pixel icons (.ico files).

> **Note:** Conditional Formatting does not perform the same function in the org chart as the display of group icons. In particular, if you want to show that an employee is a member of more than one group, use the group icon feature.
>
> Using group and multi-reporting relationship icons in conjunction with Conditional Formatting is not recommended. These two features distinguish different aspects of group information and are not meant to work together.

1. Click the Search  button in the toolbar. The *Search* dialog opens.

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2. Click the **Groups** tab and double-click on the group you want to modify. The Group Editor dialog opens.
3. Select the radio button to choose from **Small icons** or **Large icons**.
4. Click the down-arrow in the **Displayed image for people** in this group field and select the icon you want to display from the pull-down list.

   You can also scroll to the end of the list and click **Other**. This opens the *Select an icon file* dialog where you can browse to another icon image resource file. Valid files of type are *.ico, *.dll, *.exe, *.ocx.
5. If applicable, you can select the check box to **Hide this group in published chart**. For additional information, see the Hiding Groups procedure in this document.
6. Click **Save**. The dialog closes.
7. Click **Close** to return to the *Chart View*.
8. The selected group icon displays in the lower-left corner of the group member's box. You can change where you want to display the icon by selecting **Format** from the menu and **Boxes** from the options list. In the **Show group icons** field, select **Left**, **Center**, or **Right**.
9. You can click on the group icon to open the Group Editor dialog to modify or delete (select **(None)** from the pull-down list) the displayed icon.

   Note: This feature is also seen in the published cross-browser/Silverlight chart.

Group and Multi-reporting Relationships Icons

You can select a unique icon to associate with a specific group. The icon displays in the chart box next to the name of each person who is a member of that group. If a person is a member of multiple groups, multiple icons display in the box. When you click on a group icon, the *Search View* opens with a list of all the people in that group.

Note: Using group and multi-reporting relationship icons in conjunction with Conditional formatting is not recommended. These two features distinguish different aspects of group information, and are not meant to work together.

See the Group Icon Chart Legends section for details on viewing and displaying a list of group icons used in the chart. See the Printing a Chart Legend for details on printing a group icon legend.

Note: You can use 16-bit or 32-bit icons for both the group and multi-relationship icons.

Adding Multi-relationship Icons

You can use this feature for matrix reporting to indicate employees who report to more than one supervisor. In order to do this, each employee must have a unique ID in the ID field of the *Update Person* dialog. This file is "searchable" and, therefore, can be viewed by end users. Do not use sensitive data in this field.

Using group and multi-reporting relationship icons in conjunction with Conditional Formatting is not recommended. These two features distinguish different aspects of group information and are not meant to work together.

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Note: In the printed version of a book, matrix reporting is indicated by persons appearing multiple times in the index, with a page number for each appearance. We recommend that you format indirect relationships differently, such as with a dotted line.

1. Verify that unique IDs exist for each employee. To open the *Update Person* dialog, double-click on a person's name in the chart. If the ID field is empty, add the employee ID.

   If you build charts from data, you can choose to enter this information manually, as stated above, but when your chart is refreshed, this information will be lost. If you want the unique ID to be permanent, you must make the changes in your database.

2. Click **Format** in the Main menu and **Chart** from the pull-down list. The *Format* dialog opens at the **Chart** tab.
3. Click in the **Multiple report icon** field to display the list of existing icons. Click on the image you want, or click **Other** to navigate to an icon from another icon resource file.
4. Click **OK**. The dialog closes and the *Chart View* displays the multiple report icon in the lower-left corner of the boxes.

   You can click on the icon to display the *Search View* which lists each instance of the person in the chart.

   Multiple reports display separately in the *List View* for each time they occur in the chart. You can click on an instance of the name to locate the person in the chart.

Resizing Wizard Icons

You can resize the icons used in the *Wizard View*.

1. Select **View** from the Main menu then **Wizard View** from the pull-down list. The *Wizard View* opens.
2. Right-click within the view.
3. Select **Large icon** or **Small icon**. The *Wizard View* immediately displays the resized icons.

Inserting Logos

OrgPublisher enables you to insert your company logo into your org chart. The logo displays at the top of the chart in the *Chart View*, either to the left or right, and appears on every page or window of your chart. You can also insert a logo as a watermark or background in your chart, or insert special graphics or instructions instead of a logo. Valid file types are GIF, JPG, TGA, PCX, and DIB.

Note: You can insert one logo per chart, across all styles.

1. Select **Insert** from the main menu, then **Logo** from the options list. You can also select **Tools**, then **Logo Wizard**. If you are modifying an existing logo, right-click on the logo. The *Logo Wizard* opens.
2. Type or **Browse** to the **Logo file name**. Click **Next**.
3. If you are deleting a logo, just delete the file name from this field. Click **Next** and proceed to Step 6.

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4. To add a logo to your chart, select the alignment you want for your logo from the drop-down **Alignment** list.
5. Select the **Show Logo** check box if you want the logo displayed. (You may create styles that do not display the logo.) A preview of the logo is shown.
6. If the logo is too large to see in the preview pane, you can select the **Shrink to fit** check box.
7. Click **Back** if you need to change the logo or graphic. If the logo is correct, click **Finish**.

Styles

You can create styles to configure your charts to look a certain way and to retain these formats for use in new charts. There is no limit to the number of styles. In addition, you can build multiple styles for each chart to vary the display of your chart information. If you publish your charts with OrgPublisher PluginX, your users can switch styles while viewing your chart.

Click the Style View button  to open the Style View for the list of chart styles. You can create or modify a style with menu options or by using the Style Wizard.

Creating and Using Styles

You can create multiple styles in OrgPublisher for each chart to vary the display of your chart data and to help format your chart.

Note: Applying a chart design template overwrites any Advanced Box Layout settings you may already have in your chart.

Topics Pertaining to this Section	
Adding Multiple Styles	Modifying an Existing Style
Applying a Chart Design Template	Pinning the Style View
Attaching or Removing Group Icons in Styles	Securing Styles to a Group
Choosing a Background Image and Style	Select a Window Layout for the Chart View
Creating a Backup Style	Select chart layout style
Creating a Color gradient and Style	Selecting a Planning Chart Style
Deleting a Style	Setting the Default Template
Displaying Chart Styles	Showing or Hiding the Style Bar
Editing the Style Bar Label	Using Additional Gradient Options
Enabling or Disabling Styles Tabs	Using styles
Formatting Cross browser/Silverlight Charts by Style and Position Type	Using the Tabbed Style Selector
Inserting a Background Image	Viewing Available Styles

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Adding Multiple Styles

You can create more than one style within your org charts. Multiple styles are useful if you need the org chart to serve several purposes. You can also use the *Styles* dialog, or you can apply a chart design template to add a style to your chart.

1. Select **Tools** from the Main menu then **Style Wizard** from the pull-down menu.
2. If you are working with prebuilt reports, see the Adding Multiple Styles for Prebuilt Reports procedure.

   If you are not working with prebuilt reports, click **Next**.
3. Choose either **New Style** or **Existing Style**. If you select to use an existing style, choose a style from the drop-down list, click **Next** and proceed to Step 7.

   If you chose to create a new style, click **Next**.
4. Type the new **Style name**.
5. Choose either **Use this wizard to create a new style** or **Make a copy of an existing style**. If you select to use an existing style, choose a style from the drop-down list and click **Finish**.

   If you selected to create a brand new style, click **Next** and proceed to Step 6.

   Note: Some charts built from data may not be changed with these options because of how the data was brought into the chart.
6. Choose a method to format your chart, **Selecting a chart design template** or **Using the wizard**. Click **Next**.

   If you select the chart design template option, proceed to Step 14.
7. Select a radio button for the chart layout you want to use. A simple graphic sample is provided for each layout choice. Click **Next**.
8. Select the radio button that describes how you want to arrange people in the chart boxes. Click **Next**.
9. This dialog appears only if you already have data in your chart. Accept the default to show **All Position Types** in the style, or select the specific position types you want to show in this style. Click **Next**.
10. This dialog opens only if you already have data in your chart. Select the radio button for the type of chart title you want. Select **Automatic** if you want the chart title to be the same as the first box title.

    If you want to add a unique title, select **Custom Title** and type the chart title in that field. Click **Next**.
11. Indicate the **Levels to Display** in the chart from the drop-down list.
12. If you have several levels in your chart and you choose to display just a few, you can select **Enable Drill-up/Drill-down buttons** so that your users can navigate through the chart levels. Click **Next**.
13. Select the check box next to each view you want to display in the chart. Click **Next**.
14. If you selected the **Chart Design Template** option in Step 6, the next dialog displays thumbnail layouts of preformatted templates available. Select the layout you want then click **Next**.

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15. From the thumbnails, select the format you want for the *Chart View*. Click **Next**.
16. You can click **Back** in order to modify any of your choices, or click **Finish** to close the wizard and open your chart in this style.

Applying a Chart Design Template

Note: Applying a formatting template overwrites any Advanced Box Layout settings you may already have in your chart.

1. Select **Tools** from the Main menu then **Style Wizard** from the options list. You can also click the Chart Design Templates button in the Format toolbar. The Style Wizard opens.
2. Select the **New Style** radio button. Click **Next**.
3. Type the new **Style name**.
4. Select the Use this wizard to create a new style radio button. Click **Next**.
5. Select the **Selecting a chart design template** radio button. Click **Next**.
6. Use the scroll bar to view the thumbnails for available window layouts. Select the layout you want then click **Next**.

Note: The Chart Design Template feature tries to match position types in the source chart. If it can't find a position type match then the manager formatting is applied.

Attaching or Removing Group Icons in Styles

You can choose not to display a group icon in selected styles in your chart by using the *Attach Groups to Styles* dialog.

Note: This feature is also available in the published cross browser/Silverlight chart.

1. Select **Options** in the OrgPublisher Main menu, then **Group display options**.
2. Click **Manage Group Attachment**. The *Attach Groups to Styles* dialog opens. Group names are shown on the left and style names appear at the top of the columns.

   The default is to attach all group icons to all styles in the chart.

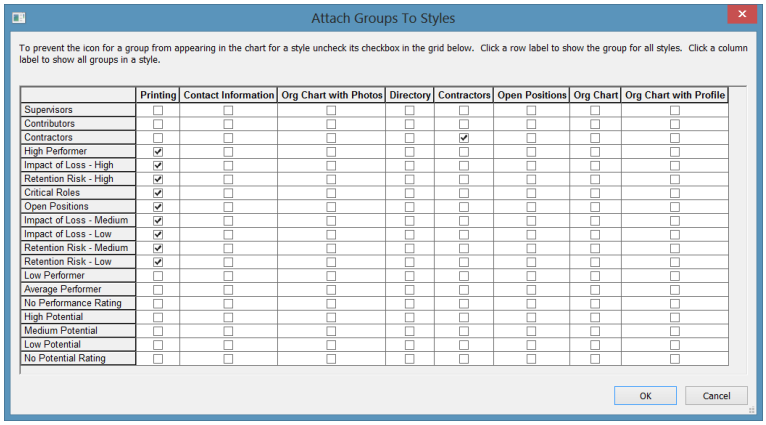


Figure 100.

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3. Find the style you want to modify, then clear the check box for each named group you do not want to visually display in the chart.
4. When you have finished modifying the styles to not display a group icon, click **OK**.

   When you return to the chart and select a modified style, icons do not appear in chart boxes for the groups you modified.

Choosing a Background Image and Style

You can select a background image, or watermark, either from the OrgPublisher folder or from your own library, and then choose a background style.

1. Select **Format** from the Main menu then **Chart** from the pull-down menu. The Format dialog opens at the **Chart** tab.
2. Select the style you want to modify from the drop-down list in the left pane of the dialog.
3. Click inside the **Background Image** field in the **Value** column in the right pane, and select an image from the OrgPublisher **Samples**>**Images** folder. You can also navigate to your company folder to choose a background image. "Embed Image" displays in the field.
4. Click inside the **Background Style** field in the **Value** column, and select from the drop-down list. Choices are **Center**, **Tile**, or **Stretch**.
5. Click **OK** to accept the background choices and view the chart.

   To remove a background image, click **Remove Image** in the **Value** column then click **OK**.

Creating a Backup Style

If you have taken the effort to format the chart and create a style you want to use as a standard, it is recommended that you create a backup of that style.

1. Select **File** from the Main menu then **Styles** from the pull-down menu. The *Styles* dialog opens.
2. Select the existing style from the top-left pane that you want to backup then click **New**. OrgPublisher copies the existing style features into the new style and a new record line displays at the bottom of the list.
3. Select the text "Copy of X style" and type the name you want to use for the backup style.
4. Add any notes, if appropriate, in the **Notes** area in the center of the dialog.
5. If you are working with a secure EChart, you can secure a style to a group by selecting the group name from the drop-down list at the bottom of the dialog.
6. Click **Close**. The open style in your chart reflects the changes you have just made.
7. Select **File** from the Main menu then **Save** from the pull-down menu. You can also click the Save button  in the toolbar.

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Creating a Color Gradient and Style

OrgPublisher enables you to create a gradient color and style for your chart background. A gradient is a gradual difference in lightness or darkness of a color. A good example is the color matrix slide in the Color dialog.

1. Click **Format** in the Main menu then **Chart** from the pull-down list. The **Chart** tab of the Format dialog opens.
2. In the right-hand pane, the **Property** column displays both a **Gradient Color** and **Gradient Style** field. Click in the gradient color **Value** field to select a color for the chart background gradient. You can also select **Other** to customize a background color.
3. In the *Color* dialog, you can select one of the **Basic colors**, then modify it by moving your cursor within the color matrix and the color slide to adjust the **Hue**, **Saturation**, and **Luminosity**. When you have the color you want, as shown in the **Color/Solid** box, click **Add to Custom Colors**. Click **OK** to return to the *Format* dialog.
4. Click **Apply** to accept the change and continue working in the Format dialog or click **OK** to accept the change and close the dialog.
5. Click in the gradient style **Value** field to select how you want the gradient to display in the chart background. The black and gray tone images in the pull-down list enable you to display the gradient darker colors on the top, left, horizontal middle, or center of the chart. Click on the image that best illustrates what you want to display.
6. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.
7. If you want the color gradient to print when you print your chart, select the **Print Gradient/Background** check box.
8. Click **Apply** to accept the change and continue working in the *Format* dialog or click **OK** to accept the change and close the dialog.
9. You can also add an image to your chart background.

Deleting a Style

1. Select **File** from the Main menu then **Styles** from the pull-down menu. The *Styles* dialog opens.
2. In the upper-left pane, select the style you want to delete by clicking to the left of the name.
3. Click **Delete**. The style no longer exists. Click **Close** to return to the chart.

Displaying Chart Styles

If you have created more than one style for your chart, you can quickly view the style list and open a specific style with the Styles View.

Note: This option is not available if the Show styles in tabs option is enabled.

1. Click the Style View button  in the toolbar or, if you have not "pinned" the *Style View*, click the drop-down arrow next to the style name in the Style bar. A list of styles available for your chart appears.

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2. Click on the name of the style you want to display. For example, if a style were created to show indirect reports in your organization, you click that style name to display information for indirect reports.

Note: Deleting a group associated with a secured style makes that style available to every EChart user.

Editing the Style Bar Label

You can edit the style bar label or the filter label displayed in the right-hand of the Style Bar. The new text pre-pends the selected group name. The default label is **Filter:**.

If the Show styles in tabs **option is enabled:**

1. Right-click on the Style Bar and select **Group Selector button** then **Edit label** from the options list. The *Group button label* dialog opens.
2. Type the label name and click **OK**. Or, click **Cancel** to close the text box without modifying the label.

   You can also select **View** from the main menu then **Toolbars**, **Styles Toolbar**, **Style selector button**, and **Edit Label** from the options list.

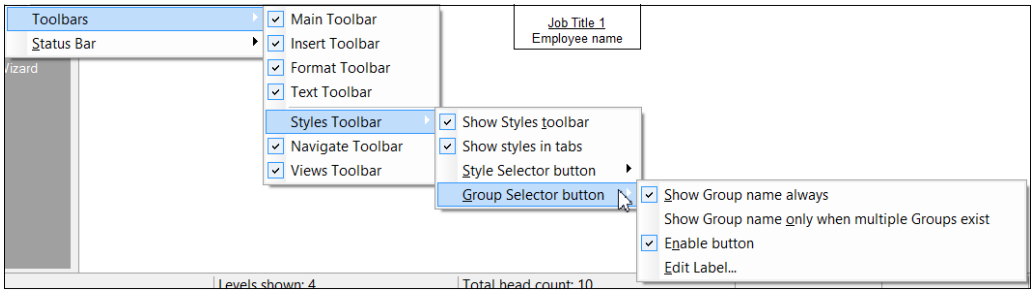


Figure 101.

If the **Show Styles in tabs** option is not enabled, right-click on the Style bar and select **Style Selector button** then **Edit Label** to open the *Style button label* dialog.

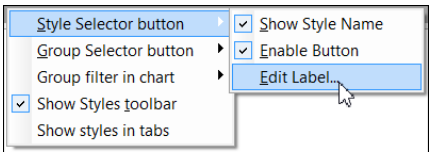


Figure 102.

Enabling or Disabling Styles Tabs

The tabbed styles option is the default selection in OrgPublisher. You can turn this option off or back on.

1. Right-click on the Styles bar in OrgPublisher. An options list appears.
2. Select the **Show styles in tabs** option to disable the tabbed styles.

   To enable the tabbed option again, repeat Steps 1-2.

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Inserting a Background Image

In OrgPublisher, you can further enhance your org chart by adding a background image, or watermark. This can be done while you are formatting the chart.

1. Select **Format** from the Main menu then **Chart** from the pull-down list. The Format dialog opens at the **Chart** tab.
2. In the **Background Image** field, click **Embed Image**. The *Open* dialog appears, enabling you to navigate to your JPG image file. Click **Open**.
3. OrgPublisher returns to the **Chart** tab. Click **OK** to accept the image and exit the dialog, or click **Apply** and proceed to step 4 if you want to continue working in the dialog.
4. If applicable, select a style for the background image in the **Background Style** field. Click the down-arrow and select **Center**, **Tile**, or **Stretch**.
5. Click **OK** to accept the image and exit the dialog, or click **Apply** if you want to continue working in the dialog.

Modifying an Existing Style

1. To modify an existing style, open the style in your chart, make your changes.
2. Select **File** from the Main menu then **Save**. You can also click the Save button  in the Main toolbar.
3. To rename an existing style, click **File** then **Styles**. The *Styles* dialog opens.
4. Select the style you want to rename by clicking to the left of the name and then typing over the existing name text. Click **Close**.

   The current style reflects the new name.

Pinning the Style View

The Style bar, which indicates the name of the open chart style, displays just below the menu and toolbars.

Note: This option is not available if the Show styles in tabs option is enabled.

1. Click the Style View button  in the Style bar to display the list of styles for the chart.
2. Highlight a style from the list and click on the "pin"  in the upper right corner of the view. This makes the *Styles View* easily accessible while you work.
3. When you close the view, a down-arrow displays to the right of the style name in the Style bar to indicate more styles are available.

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Select chart layout style

The Layout Style  button in the Format toolbar enables you to change the chart layout. When you click the button, displayed options include:

Chart Layout button	Chart Layout Description
	**Layout 1** - Click this button to select the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	**Layout 2** - Click this button to select the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	**Layout 3** - Click this button to select the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.
	**Layout 4** - Click this button to select the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

Setting the Default Template

> **Note:** Initial formatting of the successor position type is handled in Prebuilt Reports.

1. Open the chart that contains the styles you want to use regularly, or create a style that includes colors, views, and data layouts that you want.
2. Select **File** from the Main menu then **Set Template as Default** from the pull-down menu. These styles will be active the next time you open a new chart.
3. To remove a default template, you can either rename or delete the file **Default.OTM** in the OrgPublisher directory.

> **Note:** There is no option to set a default template when using Web Administration because setting a default template on the server would set the same default for all administrators' charts.

Showing or Hiding the Style Bar

You can elect to hide the Style Bar in OrgPublisher. The default is to display the Style Bar.

> **Note:** When you choose to show or hide fields, all information viewable in the chart or search results list, also displays when you copy the chart to Microsoft PowerPoint or the search results to Microsoft Excel.

- Right-click on the Style Bar and select **Style Selector button** then **Enable button** from the options list. A check mark indicates that the Style Bar is shown in the Chart View. Clear the option to hide the bar.
- You can also select **View** from the Main menu then **Toolbars**, **Styles Toolbar**, and **Show Styles toolbar** from the options menu. A check mark indicates that the Style Bar is shown in OrgPublisher. Clear the option to hide the bar.

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Using Additional Gradient Options

Additional gradient options are available for boxes, background, and legend items.

In the gradient drop down, the black is the background color representation and white is the gradient representation.

1. Select **Format** from the Main menu then **Boxes** from the pull-down menu. The Format dialog opens at the **Boxes** tab. You can also use the Format Box button in the toolbar.
2. Select the specific style you want to modify or, if you want to modify all styles for the chart, select **All Styles**.
3. Click the position type, or **All Position Types**, you want to modify. Only the chart boxes for the selected position types are modified.
4. Click the arrow in the **Gradient Style** field to select one of the new options.

You can also select the **Chart** tab and assign a new gradient style to the chart background, or select the Gradient style under the **Formatting** tab of the Chart Legend Properties dialog.

Using the Tabbed Style Selector

In addition to selecting a style from the Styles View, OrgPublisher displays available styles with tabs across the Style bar.

The last tab in the application contains a New Style button which launches the Style Wizard when selected. The tabs display in alphabetical order.

- Click on a tab to look at the selected style.

The application tabs look like this:



Figure 103.

The published chart tabs look like this:



Figure 104.

Note: The **Edit Style Bar label** option is not available if the **Show styles in tabs** option is enabled.

Viewing Available Styles

If you have created more than one style for your chart, you can quickly view the style list with the Styles View.

Note: This option is not available if the **Show styles in tabs** option is enabled.

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1. Click on the Style View button  in the toolbar or, if you have pinned the Style View, click the drop-down arrow next to the style name in the Style bar.
2. The *Styles View* opens on the left side of the OrgPublisher window.
3. Select the style from the list by clicking on the style name in the list.

Using the Format Dialog

You can define chart characteristics, such as title, box shape and color, connecting lines, and much more. The format dialog provides options within tabs to choose individual formatting items.

Topics Pertaining to this Section	
Formatting Chart Boxes	Formatting the Chart Title
Formatting Chart Text	Formatting the Chart View
Formatting Reporting Lines	Formatting with the Advanced Box Layout

Formatting Chart Boxes

You can modify a box outline, background color, and style by position type. These modifications are style specific. You can also use the Advanced box layout tab if you want to format in greater detail.

> **Note:** If there is more than on position type within a box, the top position type determines the formatting for the box.

1. Select **Format** from the Main menu then **Boxes** from the pull-down menu. The *Format* dialog opens at the **Boxes** tab. You can also use the Format boxes  button in the toolbar.
2. Select the specific style you want to modify or, if you want to modify all styles for the chart, select **All Styles**.
3. Click the position type, or **All Position Types**, you want to modify. Only the chart boxes for the selected position types are modified.
4. Change the appropriate values:

Values	Description
Style	Choose a box style for the selected position in the current style. All box styles have background color and several have shadows. Both can be configured using the box options.
Show only text	Select to show text for the position in the current style. This hides the box outline, shadow, and background color.
Width	Type the box width for the selected position type in the current style. If the text is wider than the box width, it wraps automatically. This setting applies to all boxes in the chart. The maximum range is between **5** and **100**. *This field must be changed from the default setting in order to place text outside the boxes using the Advanced Box Layout Editor. Change the width to a number wide enough to accommodate the text.*
Height	Type the minimum box height for the selected position type in the current style. If the wrapped text is taller than this setting, the box height automatically increases to fit the text. This setting applies to all boxes in the chart for this position type. The maximum range is between **0** and **500**.

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Values	Description
Show outline	Select to show the box outline for the selected position type in the current style; or clear the selection to hide the box outline. If you hide the outline, other box components such as background color and shadow still appear.
Outline width	Type the width of the line surrounding the box for the selected position type in the current style.
Background color	Select a predefined or custom color for the box background for the selected position type in the current style.
Shadow color	Select a predefined or custom color for the box shadow for the selected position type in the current style.
Outline color	Select a predefined or custom color for the box outline for the selected position type in the current style.
Gradient Color	Select a predefined or custom color for the box gradient for the selected position type in the current style.
Gradient Style	Select a box gradient for the current style from the drop-down list.
Show head count	Select to show the number of filled or open positions in the current style with **Count** set to **Yes** inside the box. To be shown in the count, a person's position type must be defined to show count.
Show group icons	Indicate where you want the group icons to display in the current style, if applicable, in respect to the person's name in the box. Click in the field to display the drop-down list and select **Left**, **Center**, or **Right**.

5. Click **OK** or **Apply**.

Formatting Chart Text

You can format the job title, box title, or name text within a position type for the current style. If you have custom fields for a position type, you can also format that text.

1. Select **Format** from the Main menu then **Text** from the pull-down menu. The Format dialog opens at the **Text** tab.
2. Select the specific style that you want to change or, if the change is to be applied to all the styles for a chart, select **All Styles**.
3. Select the position type, for example **Manager**, or **All Position Types**.
4. Select the category you want to format, such as **Box Title**. If applicable, choose the custom field you want to modify.
5. Change the appropriate values. These options may vary, depending on the component you select.

Values	Description
Position Type	This field displays the position type to be formatted in the current style. The position type can also be renamed if a component under the position type is selected.
Show	Shows the selected position type in the current style when the chart is published or in View Mode.
Bold	Bolds text in the current style for the selected component of the position type.
Italic	Italicizes text in the current style for the selected component of the position type.
Underline	Underlines the text in the current style for the selected component of the position type.
Text color	Choose predefined or custom color text in the current style for the selected component of the position type.
Align	Aligns (**Left**, **Center**, or **Right**) text in the current style for the selected component of the position type.

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Values	Description
Name format	Choose a format to display employee names in the current style for the selected position type; for example **F**. Last indicates first initial, last name.
All caps	Displays text for the selected component, with the exception of the **Name** component, of the position type in all capital letters in the current style.
Leading caps	Capitalizes the first letter of each word in the selected component of the position type in the current style.
Leading spaces	Type the number of blank lines to appear above the selected component of the position type in the current style.
Trailing spaces	Type the number of blank lines to appear below the selected component of the position type in the current style.
Label	Type the label for the selected component of the position type in the current style.
Show label	Shows the label for the selected component of the position type in the current style.
Label position	Choose the location of the selected component label, either above or next to the component it describes in the current style.
Show Photo	Shows the photo (if applicable) for the selected position type in the current style.

Click **OK** or **Apply**.

Formatting Fonts

The format text option changes the default character attributes of the chart's text. Attributes include font name and point size.

A preview sample box displays an example of the text before you assign the attribute.

1. Select **Format** from the Main menu then **Font** from the pull-down menu. The *Font* dialog opens.
2. Choose the font type you want to use.
3. Choose the size.
4. Confirm your selections in the **Sample** area of the dialog.
5. Click **OK**. The new font format displays in your chart.

Formatting Reporting Lines

You can not only format reporting lines by relationship, direct or indirect, you can also select line attributes for each position type in the current style.

The reporting line format is style specific.

You can also use the Advanced box layout tab if you want to format in greater detail.

1. Select **Format** from the Main menu then click **Lines** from the pull-down menu. The *Format* dialog opens at the **Lines** tab.
2. Click the relationship type to modify. If you want to format by a specific position type, you must expand **Direct Report** then select the position type, or **All Position Types**.
3. Select the position type and change the appropriate values:

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Values	Description
Type	Select the reporting relationship for the line you want to format in the current style.
Line Style	Choose a line type for the selected relationship in the current style. If you plan to change the line width, you must select a solid line style. (Microsoft Windows limits dashed lines to one point.)
Width	Type or select a width of the solid connecting line for the selected reporting relationship in the current style. (Microsoft Windows limits dashed lines to one point.)
Color	Choose a predefined or custom color of the connecting line for the selected reporting relationship in the current style.

Click **OK** or **Apply**.

Note: When using conditional formatting, the reporting line format is based on the conditional position type.

- If the first and last report-to box line styles are identical, that style will be used for shared areas. If you do not select a particular line style for the middle boxes, they will always take the default line style (as selected for Direct Reports).
- If first and last report-to box line styles are different the default line style (as selected for Direct Reports) will be used for shared areas.
- Direct reports default line style doesn't refer to All Position Types. It is used only if you don't expand the node.

Formatting the Chart Title

You can format the chart title for the current style separately from the rest of the chart text.

1. Select **Format** from the Main menu then **Title** from the pull-down menu. The *Format* dialog opens at the Title tab.
2. Modify or select the appropriate values.

Values	Description
Show chart title	Shows the title at the top of the chart in the current style.
Title width	Type the number of characters across that are allowed for the chart title in the current style. If the title text is wider than the available width, it is automatically wrapped, or divided, into more than one line.
Auto Title	Select to make the chart title of the current style the same as the title of the top box.
Custom Title	Type a title for the chart in the current style. To do this, clear **Auto Title**.
Title font	Select the default font for the chart title in the current style.
Title font size	Select the default font size for the chart title in the current style.
Title color	Select a predefined or custom color for the chart title in the current style.
Title bold	Select to show the chart title in bold text for the current style.
Title italic	Select to show the chart title in italic text for the current style.
Title underlined	Select to underline the chart title in the current style.
Title with AsOf Date	Select to add the current date to the chart title in the current style.
AsOf Date Format	Select to format the date, for example, **MM/DD/YYYY**.
Title Separator	Type the character to use as the chart title and date separator in the current style.

3. When you have completed your changes, click **OK**.

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Formatting the Chart View

You can update a chart's box arrangement, background, and default text information at any time. You can do this across all styles or for just one style. In addition you can modify the shape and color of the drill button to better match your corporate style, making your chart more cosmetically appealing.

1. Select **Format** from the Main menu then **Chart** from the pull-down menu. The *Format* dialog opens at the **Chart** tab.
2. Select the style you want to modify from the drop-down list.
3. Change the chart layout in the left-hand pane of the dialog, or the property values such as background color, gradient, background/watermark or font size from the right-hand pane.

Values	Description
Style	Select the style of your chart you want to format.
Layout 1	**Horizontal** - Lowest level of each branch in the chart is arranged in a horizontal line. This creates shorter, wider charts.
Layout 2	**Vertical** - Lowest level of each branch in the chart is arranged in a vertical row. This creates narrower, taller charts.
Layout 3	**Side by side** - Lowest level of each branch in the chart is arranged with the boxes side by side. This creates more compact charts.
Layout 4	**Stacked** - Lowest level of the chart (displays only two levels) is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.
Background color	Select or define a color for the chart background.
Gradient Color	Select a predefined or custom color for the chart gradient.
Gradient Style	Select a chart gradient style from the drop-down list.
Background Image	Select an image to use as a chart background, or watermark, by clicking **Embed Image**. You can also delete an existing background image by clicking **Remove Image**.
Background Style	Select the style for the background image from the drop-down list, **Center**, **Tile**, or **Stretch**.
Print Gradient/ Background	Select this check box if you want to print your chart gradient or background.
Multiple report icon	Select an icon to use in the chart to indicate a person reports to more than one supervisor by clicking on the down-arrow and choosing an image. You can also select **Other** to open the Select an icon dialog and browse to a different icon source file.
Multiple/Indirect report display properties	Select the Click to modify button to open the Show/hide Fields dialog. This field is used to view indirect managers in the Matrix Hover Display.
Auto Build	Select an **Auto Build** option to change how reporting employees are shown. Select one of the following options: **Normal** - Each employee in the chart has his or her own box, with its own reporting line. **Reports in one box** - All reporting employees are included in the box of the person they report to. Position types with a zero (0) priority remain in their own box. **Reports in box below** - All reporting employees are included in the same box, with a single line indicating to whom they report.
Horizontal spacing	Type the horizontal space between boxes.
Vertical spacing	Type the vertical space between boxes.

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Values	Description
Drill button type	Click on the **Click to modify** button in this field to open the Customize Drill Buttons dialog.
Chart font	Select the default font type for the chart text in the current style.
Chart font size	Select the default font size for chart text in the current style.
Automatic row size	Select this check box when using chart layout 4, typically for use in a smaller window, if you want OrgPublisher to automatically set the number of boxes across in a row.
Boxes per row	Select this check box when using chart layout 4. Type the maximum number of boxes to print in a row. The minimum number of boxes across is **4**. (The chart style is automatically stacked, meaning there are two levels of the organization per page; the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.)
Align box levels	Available if chart layout 1, 2, or 3 is selected; horizontally aligns the top of the chart boxes in each level.
Hide lowest boxes	Available if chart layout 1, 2, or 3 is selected; hides box outlines in the lowest level of the displayed chart.
Show Hover Profile	Select this check box to enable the display of the Hover Profile. The default is set to off.
Hover Profile Delay (ms)	Type the number of milliseconds to hover over the field before displaying the Hover Profile. Limits are between **1000** - **20,000**.

4. When you have completed your changes, click **Apply** to add your changes and continue working in the *Format* dialog. Click **OK** to add your changes and close the dialog.

Advanced Box Layout Editor

With OrgPublisher you can use the *Advanced Box Layout Editor* to display more information more concisely. The advanced box layout provides more flexibility in displaying information in the chart box, such as the use of columns, and helps you conform to your existing documentation standards.

To view tips to remember when using this feature, see the *Using the Advanced Box Layout Editor* topic in the OrgPublisher application **Help File**.

Formatting with the Advanced Box Layout Editor

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The **Advanced box layout** tab opens displaying a single check box.
2. Select the **Use advanced box layout for this position type** check box. The layout options display in the dialog.
3. Choose a style you want to format from the pane on the left, then choose a position type within the style.

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4. Select one or more of the fields in the right pane to edit: **Box Title**, **Job Title**, **Name**, or custom field.

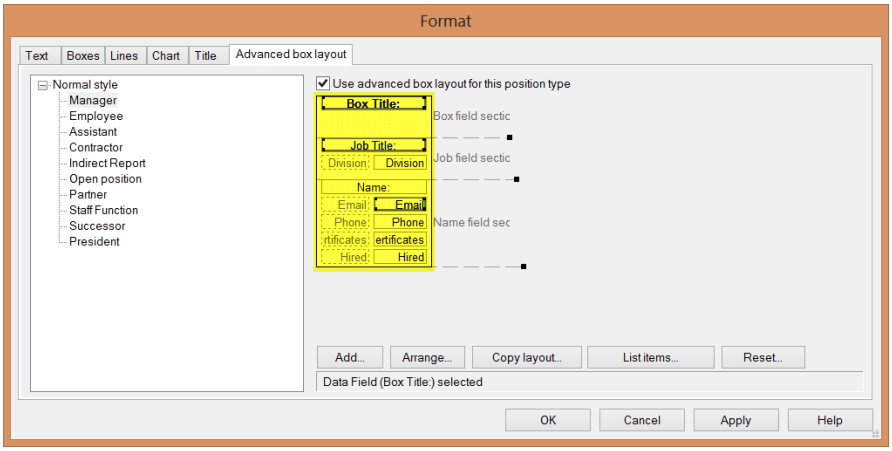


Figure 105.

New with version 11.6, you can select multiple fields to modify in the workspace. In the above example, the box title, job title, and Email fields are selected.

5. If you add many fields to the chart box, the box layout editor may display a message at the bottom of the list box, for example, "The box is taller than this window. Please expand the window height."

Adding Items to a Box Layout

Within the *Advanced Box Layout Editor*, you can add items to the box layout in the current style by field, as well as align and format the text of those items.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The *Format* dialog opens to the **Advanced box layout** tab displaying a single check box.
2. Select the style, if applicable, and the position type you want to modify from the left pane.
3. Select the **Use advanced box layout for this position type check** box. The advanced box layout options appear.
4. Click **Add**. The *Add Item to Layout* dialog opens. Three types of fields are available, **Box field**, **Job field**, and **Name field**. Associated custom fields display for each field.
5. Select the field you want to add, such as a photo or e-mail address. If you want the field label, as well as the field data, to display in the box, select the **Automatically add label item** check box at the bottom of the list box.
6. Click **Add item**. The item is added to the **Advanced box layout** tab

Arranging Sections in the Box Layout

The default order of the primary three fields in OrgPublisher chart boxes is **Box** first, **Job** second, and **Name** third.

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1. You can modify the sequence of the name, job, and box title fields by clicking **Arrange** at the bottom of the dialog. The Arrange Sections dialog opens.



Figure 106.

2. Select the field sequence you want to use and click **OK**.

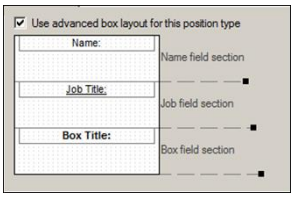


Figure 107.

Sizing the Chart Box Section

Place the mouse pointer on the section sizing handle. An up/down arrow appears. Drag the handle up or down to adjust the section height.

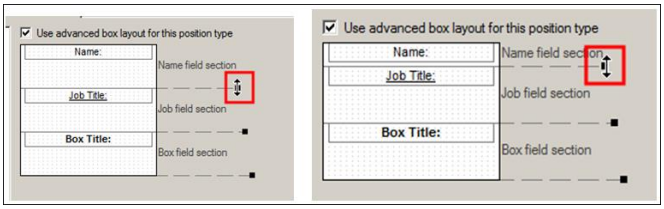


Figure 108.

To adjust the box width, access the **Boxes** tab in the *Format* dialog.

Moving, Deleting, or Resizing a Data Element

Each field contains two data elements, the field label and the field data. These elements can be moved or deleted from the chart box section.

The label is outlined with at dashed line and the data is outlined with a solid line.



Figure 109.

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- To delete an element, right-click on it and select Delete from the context menu.

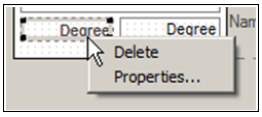


Figure 110.

- To move an element, place the mouse cursor over the element and click to select. Move the pointer on top of the element and it changes to a 4-headed arrow.

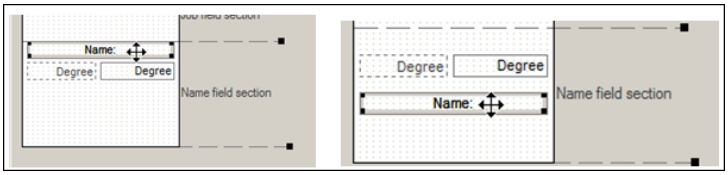


Figure 111.

Hold the left mouse button down and drag the element to a new location.

Note: Field elements cannot move from one section of the chart box to another.

- To change the size of an element, place the mouse pointer on the edge of the element. The pointer changes to a double-headed arrow.

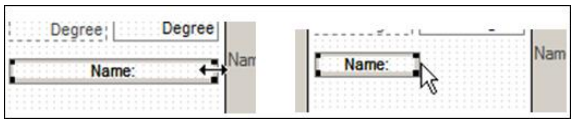


Figure 112.

Hold the left mouse button down and drag to resize.

Note: The size of the element determines how much data displays in that field. The element does not get taller to allow for text wrapping. You must use the resize tool to increase the height of the element.

Copying the Box Layout to Another Position Type

You can copy the advanced box layout of one position type to another position type in the current style.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The *Format* dialog opens to the **Advanced box layout** tab. Since you have modified a layout previously, the advanced box layout options are shown.
2. Click on the style, if applicable, and the position type layout you want to copy.
3. Click **Copy layout**. The *Copy Box Layout* dialog opens.
4. Select the style, if applicable, and the position type to which you want to copy the layout.
5. Click **Copy**. A message notifies you that the layout has been copied successfully.

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6. Repeat steps 2 - 5 if you want to copy the layout to multiple position types, or click **Close** to exit the list box.

Reviewing List Items in the Box Layout

You can review a list of items in the box layout in the current style. Selecting an item is the same as selecting it within the layout tab.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The Format dialog opens to the **Advanced box layout** tab. If you have already used the **Advanced box layout** tab for this chart, the layout options are enabled.
2. Select the **Use advanced box layout for this position type** check box, if applicable. The advanced box layout options appear.
3. Click **List items**. The *Box Layout Items* dialog opens. The three sections of the layout editor appear, **Box field section**, **Job field section**, and **Name field section**. Data and information fields added using the Add Item to Layout dialog display within each section.
4. Click **Done** to close the list box and return to the **Advanced box layout** tab.

Resetting the Box Layout

You can choose to reset the box layout to the default settings.

> **Note:** This reset feature *deletes ALL formatting* done in the **Advanced box layout** tab, not just in the current instance. Do not use this button as an "undo" button.

1. Select **Format** from the Main menu then **Advanced box layout** from the options list. The *Format* dialog opens to the **Advanced box layout** tab displaying the current advanced settings.
2. Click **Reset**. A message displays verifying that you want to lose all the current settings and revert back to the default settings in the chart.
3. Click **Yes** if you do or **No** if you want to leave the settings as they are or adjust them individually.

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Summaries and Formulas

You can use summary fields in your chart to summarize numerical data for reports or what-if planning.

Note: In conditional formatting, the search feature and **all calculations follow the conditional position type**. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, **head counts display in both areas**.

If there is more than one group-based position type for which a person qualifies, the **first match** is used in Search and Summary tasks.

Formula fields allow users to define and populate a new, or existing, custom field based on values provided in other custom fields or using other criteria.

Topics Pertaining to this Section	
Adding a Summary Field	Population for a Summary Field
Adding Summary Fields for Levels and Span of Control	Printing the Summary View
Adding Summary Fields Manually to an ODBC Chart	Resizing Rows and Columns in Summary View
Copying the Summary View	Summary View
Creating a Group Summary	Summary Wizard
Displaying Summary Fields	Creating Workforce Analysis Graphs
Including/Excluding Position Types in Summary View	Formulas
Inserting a Summary Field	Inserting Formulas

Summaries

Note: Orphan records and broken hierarchies adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.

Adding Summary Fields for Levels and Span of Control

In OrgPublisher Premier, an additional option is available when creating a summary field using the **Sum**, **Count**, and **Average** levels and span of control custom fields. The new field has been added to the bottom of the *Custom Field Properties* dialog.

Note: When you make changes to a summary field, OrgPublisher recalculates the field from the top of the chart through the bottom level.

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. You can also use the Custom fields button  in the toolbar. The Custom Field Properties dialog opens.

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2. Position the cursor where you want to add the summary field, either somewhere within existing fields, or at the end of the list. Click **Insert**. If you are inserting a field within the list of existing fields, a message dialog verifies that this is what you want to do.
3. Enter the field name in the **Field label** column.
4. Press the **TAB** key to move to the **Type** column and select **Sum** or **Average**.
5. Press the **TAB** key to move to the **Calc Field** and select the level or span of control numeric field on which to do the calculation.
6. Press the **TAB** key to move to the **Population** column and select the position types, such as total head count, to be included in your calculation.
7. Press the **TAB** key to move to the **Assigned To** column. The *Update Assigned Custom Fields* dialog opens. Select the position types you want to assign the custom field to, such as Manager or Director.
8. In the same dialog, choose where you want the field to display, **Box title**, **Job title**, or **Name**. Click **OK** to accept your changes and close the text box. (If you click on the position type name rather than the plus sign (**+**), the Name component is automatically selected.) Click **OK** to close the dialog.
9. The **Sample** field displays the contents of the first custom field for this **Type**.
10. The **Seq** field displays the OrgPublisher Input File record sequence for that custom field.
11. At the bottom of the *Custom Field Properties* dialog, click the drop-down arrow to select **Hierarchy** or **Level**. The name of this field will differ, depending on the type of numeric field selected, such as **Count on**, **Sum on**, or **Average on**.

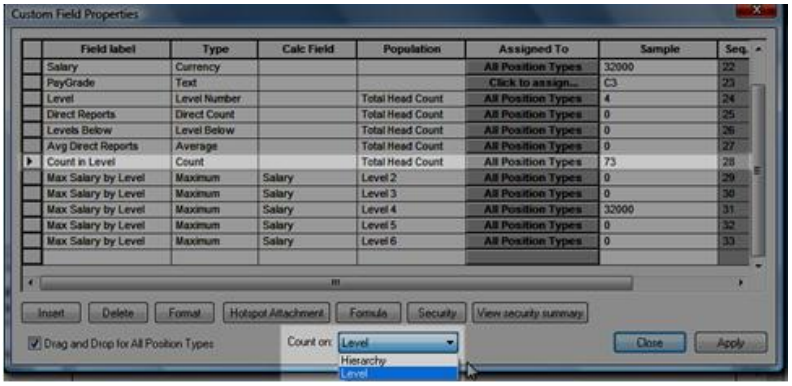


Figure 113.

Depending on the field selected, you may also see an additional check box to choose whether or not to **Include zero values**.



Figure 114.

12. Click **Apply** or **Close**.

    In the following sample Paul Melbram is in the red outlined box.

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If the **Count on** option is set to **Level**, the resulting count is 7.

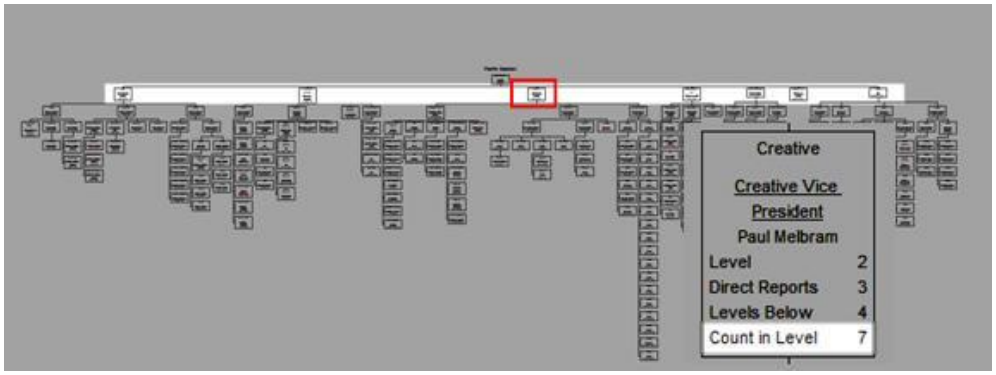


Figure 115.

If the **Count on** option is set to **Hierarchy**, the resulting count is 63.

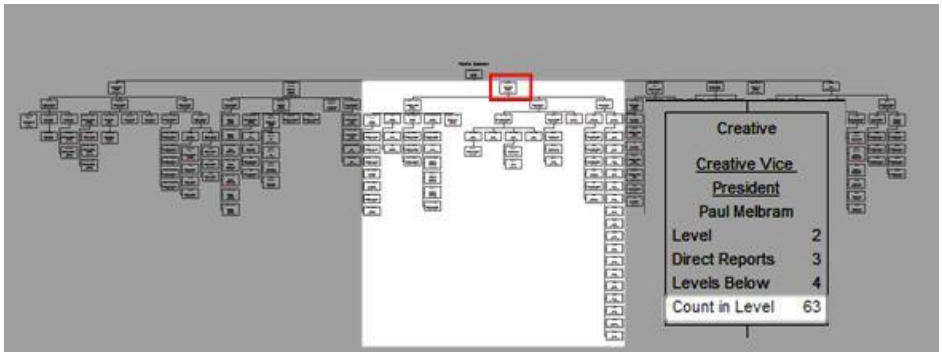


Figure 116.

Using Level or Hierarchy Options with Groups

Using a group as the selected **Population** provides more summary options. In the sample below, a custom field is created to show the count of Level 5 employees within a hierarchy.

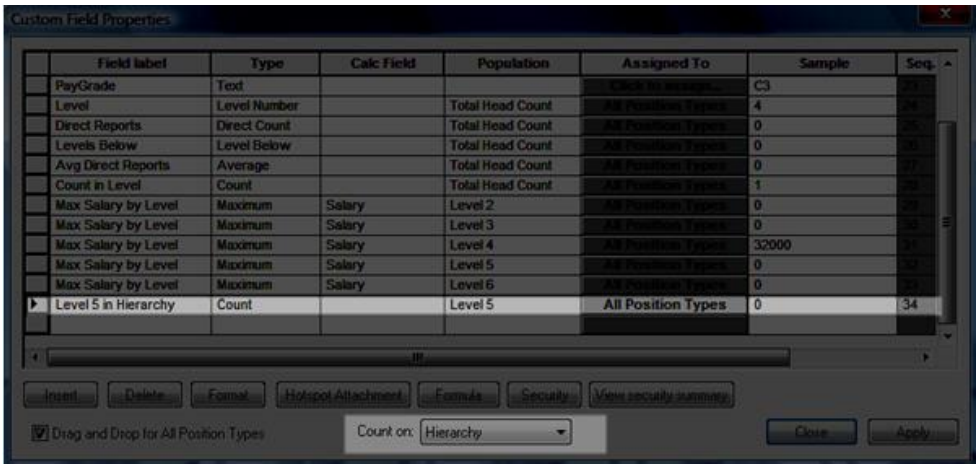

Custom Field Properties
Field label | Type | Calc Field | Population | Assigned To | Sample | Seq.
PayGrade | Text | | | | C3
Level | Level Number | | Total Head Count | | 4
Direct Reports | Direct Count | | Total Head Count | | 0
Levels Below | Level Below | | Total Head Count | | 0
Avg Direct Reports | Average | | Total Head Count | | 0
Count in Level | Count | | Total Head Count | | 1
Max Salary by Level | Maximum | Salary | Level 2 | | 0
Max Salary by Level | Maximum | Salary | Level 3 | | 0
Max Salary by Level | Maximum | Salary | Level 4 | | 32000
Max Salary by Level | Maximum | Salary | Level 5 | | 0
Max Salary by Level | Maximum | Salary | Level 6 | | 0
Level 5 in Hierarchy | Count | | Level 5 | All Position Types | 0 | 34
Insert
Delete
Format
Hotspot Attachment
Formula
Security
View security summary
Drag and Drop for All Position Types
Count on: Hierarchy
Close
Apply

Figure 117.

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The chart box results show that Paul Melbram has 48 Level 5 employees in his hierarchy. Amy Stepp has 0 Level 5 employees in her hierarchy.

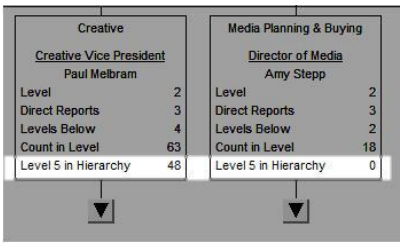


Figure 118.

Adding Summary Fields Manually in an ODBC Chart

When OrgPublisher imports data to create a chart, it verifies that a field exists in the position that the data field is mapped to. It will add more field definitions if necessary. The properties of the current fields (type, name, etc.) are not taken into consideration.

If you have manually added summary fields and then want to go back and import more fields from the data source, please do the following.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. You can also use the Custom fields button in the toolbar. The Custom Field Properties dialog opens.
2. Select the top-most summary field and click I**nsert** once for each new data field you want to import.
3. Type your field label names and attach the new fields to the appropriate position types.
4. Click **Apply** then **Close**. The *Custom Field Properties* dialog closes.
5. Select **Data** in the Main menu then **Manage data sources**. The *Data sources* dialog opens.
6. Click **Properties** to open the *New Chart Wizard*.
7. Follow the wizard dialogs to map the new fields.
8. Complete the wizard and click **Finish**. The summary fields are added correctly to your chart.

Copying the Summary View

You can copy information from the *Summary View* to other Microsoft® Windows® applications.

Note: The *Summary View* is not available in a published real-time chart.

1. Right-click in the *Summary View*.
2. Select **Copy Summary** from the options list.
3. Click the Copy button in the toolbar.
4. Open a Windows application and click the Paste button. The summary information displays in the new application.

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Creating a Group Summary with the Summary Wizard

In OrgPublisher, you can use the summary feature to generate a group head count.

> **Note:** If you create a group based on a standard position type, such as Manager, and then associate a custom position type to the group for conditional formatting, such as Top Performing Manager, the original position type is no longer a part of the group criteria.
>
> For instance, if you then searched for all "managers" the "top performing managers" will not be part of your search results because they are now a different position type. Your Boolean search should use both the original position type, Manager, and the new position type, Top Performing Manager, as a criteria using **And/Or**.

1. Open the *Summary Wizard* by selecting Tools from the Main menu then Summary Wizard from the options list. Click **Next**.
2. Select the **Numeric Field to Summarize** and the **Type of Summary**. Click **Next**.
3. Click the drop-down arrow in the **Population** field and select the group name for which you want to create the summary. Click **Next**.
4. Type the summary **Label**. Click **Next**.
5. Select the **Position type** to display the summary field. Click **Next**.
6. Click **Finish**. The new group summary field displays in the *Summary View*.

Displaying Summary Fields

In OrgPublisher, summary fields inserted in the top box of the displayed portion of the chart are also displayed in the Summary View. These fields can be hidden in the Chart View while still shown in the *Summary View*. Summary fields you may want to display include group totals, position type totals, or sales figures.

> **Note:** When you make a change to a summary field, OrgPublisher recalculates the field from the top of the chart through the bottom level.

Chart View

1. To show or hide summary fields in the *Chart View*, right-click on a blank spot in the chart and select **Show/Hide chart components**. You can also click the Show/hide chart components  button in the toolbar. The *Show/Hide Chart Components* dialog opens.
2. Click on the position type or group you want to modify, or click **All Position Types** to select a component for all position types. Navigate to the summary field you want to show or hide, and click on the green arrow or red X. The arrow indicates the field is shown in the *Chart View*. The X indicates that it is hidden.
3. Select the component in the position type or group you want to show or hide. Click **OK**.

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Summary View

1. To show or hide summary fields in the *Summary View*, right-click on a column name and select **Show/Hide columns**. The *Show/hide Fields* dialog displays the names of the columns shown in the view.
2. Scroll to the summary column names and select the corresponding check box. To move a column in the view, click the **Move Up** or **Move Down** button.
3. To show or hide specific fields, such as a group total or head count, right-click on a row in the *Summary View* and select **Show/Hide rows**. The *Show/hide Fields* dialog displays the names of the field totals in the view.
4. Scroll to the summary field names and select the corresponding check box. To move a field up or down in the view, click **Move Up** or **Move Down**.
5. Click **OK** to accept the changes and close the text box. The summary fields display in the *Summary View*.

Including/Excluding Position Types in Summary View

When you exclude, or do not count, a position type in the *Summary View* in OrgPublisher, the summary amounts for these types are not displayed in the view, and are subtracted from any totals, except for group totals.

To exclude managers from their own totals:

1. Select **Options** from the Main menu then **Summary options** from the pull-down menu.
2. Select **Exclude managers from their own totals**. The totals in the manager boxes no longer include the manager.

   You can also exclude managers from their own totals when using the *Summary Wizard*.

To exclude/include Position Types in totals:

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens.
2. Click on the record line of the position type you want to exclude from your *Summary View* totals. By default, indirect reports and contractors are already excluded from the totals.
3. Click in the **Count** field. A drop-down arrow appears. Click **No**.

   If you want to include a position type, for example indirect reports, click **Yes**.
4. Click **OK** to accept the change and close the *Define* dialog.

   If there is more than one group-based position type for which a person qualifies, the first match is used in search and summary tasks.

Inserting a Summary Field

You can add a summary field at the end of or within the list of custom fields displayed in the Custom Field Properties dialog.

1. Select **Data** from the Main menu then **Custom Field Properties** from the pull-down menu. The *Custom Field Properties* dialog opens. You can also click the Custom fields  button in the toolbar.

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2. Position the cursor where you want to add the new custom field, either somewhere within existing fields, or at the end of the list. Click **Insert**. If you are inserting a field within the list of existing fields, a message dialog verifies that this is what you want to do.
3. Enter the field name in the **Field label** column.
4. Press the **TAB** key to move to the **Type** column and select a summary type.

   Note: Succession candidates are not included in head counts or summaries.

5. Click in the **Calc Field** and select a numeric custom field to summarize.
6. Press the **TAB** key to move to the **Population** column and select the position types, total head count, or planned head count to be included in your calculation. You can select one or more position types or groups, a combination of position types and groups, or **All Position Types**.
7. Press the **TAB** key to move to the **Assigned To** column. The *Update Displayed Custom Fields* dialog opens. Select the position types or groups for this custom field. If you want all position types to have this field, select **All Positions**.
8. The **Sample** field information displays the contents of the first custom field for a selected type.
9. The **Seq.** field displays the OrgPublisher Input File Record sequence for that custom field.
10. Click **Close** to insert the new summary field in your org chart and to close the *Custom Field Properties* dialog.

Resizing Rows and Columns in Summary View

You resize the columns and rows in the *Summary View* to fit your chart.

1. In the *Summary View*, place the cursor in the column or row heading on the line separating one column or row from the next. Click and hold down the left mouse button. The cursor changes appearance.
2. Drag the column or row line to the width you want and release the mouse button.

Selecting Summary Types

There are several types of summaries you can insert in your organizational chart. You can use the *Summary Wizard* to create the summary field and select the summary type. You can also assign summary type in the Custom Field Properties dialog.

When building from data, OrgPublisher writes (and rewrites as data refreshes) to these fields based on calculations.

When selecting a summary field you are prompted to select a field type, for instance **Average** or **Percentage**, and what population (position types, total head count, or planned head count) you want to include in the calculation.

When your chart is republished or refreshed, these data fields may change, depending on your source data.

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The summary field types are:

Summary Field Type	Example
Sum	Total sales per district
Average	Tenure in company
Minimum	Training hours for all employees
Maximum	Sales by or for all employees
Percentage	Department sales to total sales

Selecting Summary Types in Custom Field Properties Dialog

1. Select **Data** from the Main menu then **Custom field properties** from the pull-down list. The Custom Field Properties dialog opens.
2. Select the summary field record by clicking inside the box to the left of the **Field label** column.
3. Tab to the **Type** column and click inside the field.
4. Use the scroll bar to locate the field type you want to assign. Click the type, such as **Sum**. See the *Formatting Numeric Custom Fields* procedure for additional information.
5. Click **Apply**.
6. Repeat Steps 2 - 5 to assign summary types to additional custom fields or click **Close** to exit the dialog.

Selecting Summary Types in the Summary Wizard

1. Select **Tools** from the Main menu then **Summary Wizard** from the pull-down list. The *Summary Wizard* opens.
2. Click **Next**. Click inside the **Numeric Field to Summarize** field and select the summary field from the options list.
3. Click inside the **Type of Summary** field and select the summary type you want to assign. Click **Next**.
4. Click inside the **Population** field and select the population for the summary field, for instance position type or group. Click **Next**.
5. Type the name you want to use for the summary in the **Label** field. Click **Next**.
6. Select the **Hide label** check box if you do not want to display the label in the chart.
7. Select the position types or **All Position Types** you want to display the summary. Click **Next**.
8. Click **Finish**.

Creating Workforce Analysis Graphs

Workforce Analysis Graphs use Summary View data to create graphs visually depicting your organization. There are 3 graph options: pie chart graph, horizontal bar chart graph, and vertical bar chart graph. Just as Summary View data changes as you drill through the chart levels, graph results also change.

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When creating new charts, OrgPublisher automatically creates a default graph reflecting the summary information. You can modify or delete this graph to suit your needs.

Graphs are displayed in published PluginX charts and EChart rich client and thin client. Thin client charts display the graphs as GIF format below the *Summary View*. Graph properties are not changeable in published charts, but may be copied to the clipboard. Graphs do not display when publishing as PDF, HTML, or when sending output to Microsoft PowerPoint.

> **Note:** Graph categories with a zero value do not appear in the graph. OrgPublisher displays percentages in graphs with 2 decimal places.

1. Open the Summary View.
2. Select the **Graphs** tab.
3. Maximize the docked window.
4. Click **New** to open the *Graph Properties* dialog.
5. Modify the properties for your graph.

Property	Description
Graph Title	Type the text you want to display above the graph.
Graph labels section	
Show Categories	Select this option to display the position type or group name for each chart element.
Show Percentages	Select this option to display the percentage each chart element represents compared to the whole.
Show Numbers	Select this option to display the actual count for each chart element.
Other Category section	
Category Name	Accept the default "Other" or type a different label. This label must contain at least 1 character; however, if you type a category name that is too long an error message displays. If you do not modify the category name, you can still open the graph view, but only the legend and category text display. The graph itself will not open.
Maximum Categories	Select the maximum number of elements from the Summary View you want to display. This number can be between 1 and 12. The default is 5. The Other category plus the independent elements equal the 12 elements allowed from the Summary View.
Minimum Percentage	Select the minimum percentage required for an independent element to display in the graph. Any element that falls below the percentage is accumulated in an ”Other” category in the graph. The default is off.
Size	
Width	Increase or decrease the width of the graph. The maximum value is 3000 and the minimum value is 100. When there are multiple graphs aligned vertically, all graphs are automatically resized to match the widest and tallest graph.
Height	Increase or decrease the height of the graph. The maximum value is 3000 and the minimum value is 100.
Summary Column	Select a summary option available in the Summary View. This is the column used for charting and is the number displayed when Show Numbers is selected. The default is the first column in the Summary View.

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Property	Description
Select Categories	Click this button to open the Select Categories dialog. Select categories from a list of all items in the Summary View. At least 1 category, and no more than 12, must be selected. Click OK.
Select Colors	Click this button to open the Select Colors dialog. Choose a color for each category displayed in the graph. Click OK.
Show Legend	When this check box is selected a legend displays for the graph. The default is selected.
Legend Options	This option is enabled when Show Legend is selected. Click this button to open the Legend Options dialog. Select background color, a border around the legend, font, and placement of the legend within the graph area. Click OK.
Zoom to Fit	If only one graph exists, select this check box to expand or shrink the graph to fill the entire graph area. If there are multiple graphs, the graph expands horizontally when the graphs are vertically aligned, and expands vertically when they are horizontally aligned. If this option is selected, you cannot resize the graph by dragging the borders.
Graph Appearance section	
Type	Select the type of graph you want to display. The default is a pie chart graph. When a horizontal or vertical bar graph is selected, the Bar Graph Options button is enabled. Click to open the Bar Graph Options dialog and modify the display of the bar chart. You can display background lines and data axis values. The maximum value displayed on the data axis is determined by adding 5% to the category with the highest value. An adjustment is made to the value to provide open space between the highest value and the end of the graph.
2D	Select this radio button to display the pie chart or bar graph in standard two dimensions.
3D	Select this radio button to display the pie chart and bar graphs in three dimensions.
Bar Graph Options	Available for bar graphs only. You can select to Display Background Lines, Display Data Axis Values; and select the Width of Bars and the X-axis Label Angle.
Preview	This area displays a sample graph with currently selected options. All graph attributes may not be shown in this view.

6. Click **OK** to close the dialog and display the graph.

Note: Workforce Analysis Graph data changes based on where you are in the chart, just as the Summary View data changes.

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Selecting Graph Categories

When you create a workforce analysis graph, you must select the categories to show in that graph.

1. Open the *Summary View* and select the **Graphs** tab.

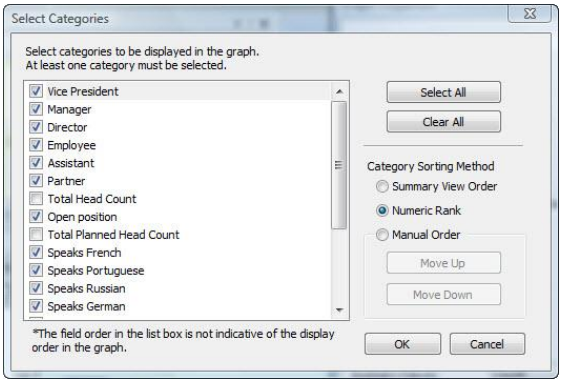


Figure 119.

2. Select each category (position type or group) individually, or click Select All. If you decide to select only specific categories, click Clear All, and then select the appropriate check boxes.
3. In the **Category Sorting Method** area of the dialog, choose to sort the selected categories to match the **Summary View Order**, in the category **Numeric Rank** in the graph, or by sorting them in **Manual Order**.

   If you select **Manual Order**, the Move Up and Move Down are enabled to arrange the categories as you want them.
4. When you have selected your categories and the sort order, click **OK** to close the dialog and return to the **Graphs** tab. Click **Cancel** to discard selections and close the dialog.

Copying a Workforce Analysis Graph

If you can view a workforce analysis graph, you copy the graph to another Windows application.

1. In the *Summary View*, click on the **Graphs** tab.

   In the **Graphs** tab, verify that you can see the entire graph and legend, if applicable. If not, resize the *Summary View*.

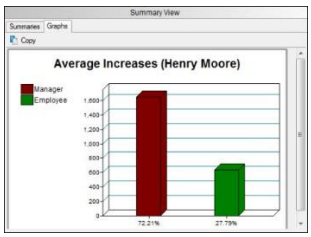


Figure 120.

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2. Click the Copy button 

. The graph is copied to the clipboard, and you can paste the graph into another application.

   You can also print a workforce analysis graph using the *Print Wizard*.

Arranging Multiple Graphs in the View

When the **Graphs** tab is selected in the Summary View, there are several buttons available to create and format a workforce analysis graph. All buttons are enabled when you select an existing graph.

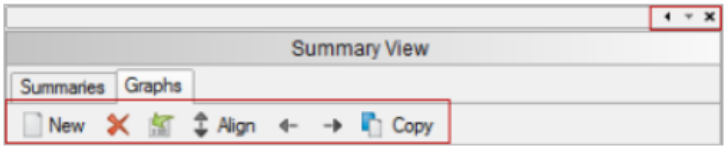


Figure 121.

You can arrange multiple graphs up and down or left and right.

1. Select a graph in the Summary View **Graphs** tab that you want to move.

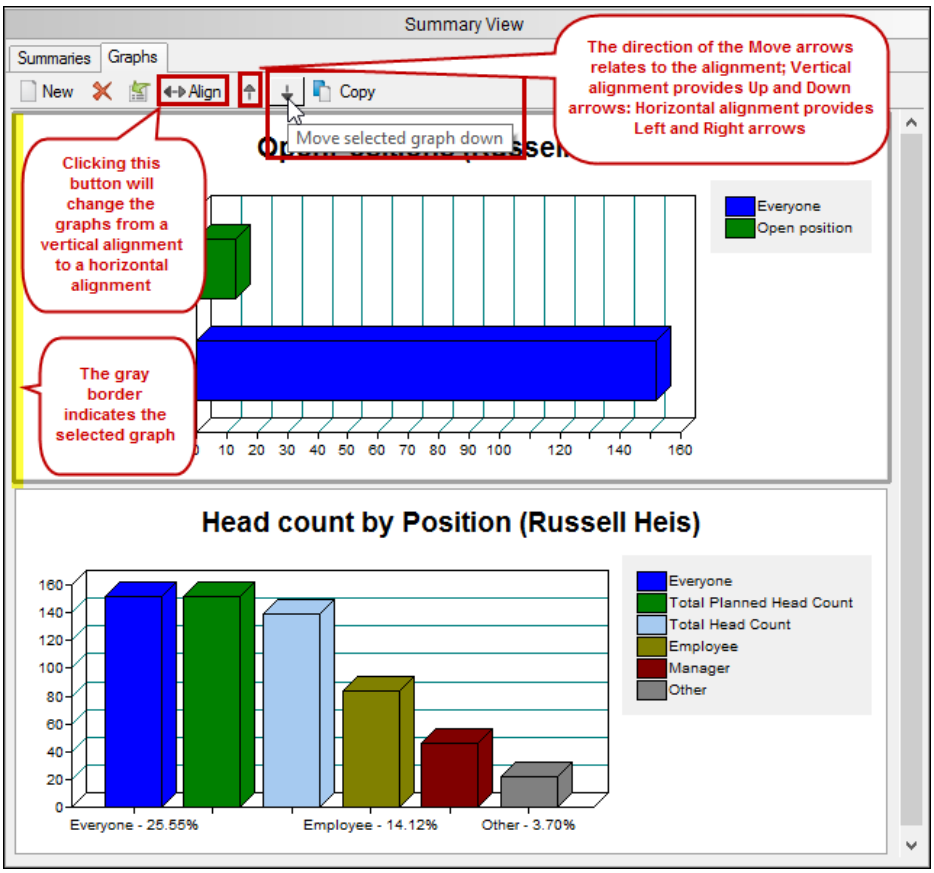

Summary View
Summaries
Graphs
New
Align
Copy
Move selected graph down
The direction of the Move arrows relates to the alignment; Vertical alignment provides Up and Down arrows: Horizontal alignment provides Left and Right arrows
Clicking this button will change the graphs from a vertical alignment to a horizontal alignment
The gray border indicates the selected graph
Everyone
Open position
10 20 30 40 50 60 70 80 90 100 120 140 160
Head count by Position (Russell Heis)
160 140 120 100 80 60 40 20 0
Everyone - 25.55%
Employee - 14.12%
Other - 3.70%
Everyone
Total Planned Head Count
Total Head Count
Employee
Manager
Other

Figure 122.

The top graph, outlined in gray, is the first in a vertical alignment, in the figure above.

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The direction in which the arrow buttons point indicate how you will rearrange the graphs when you click the buttons.

2. Select the graph you want to reposition and click one of the move buttons.

   If your graphs are aligned vertically, click the up or down button.

   If you graphs are aligned horizontally, click the left or right button.

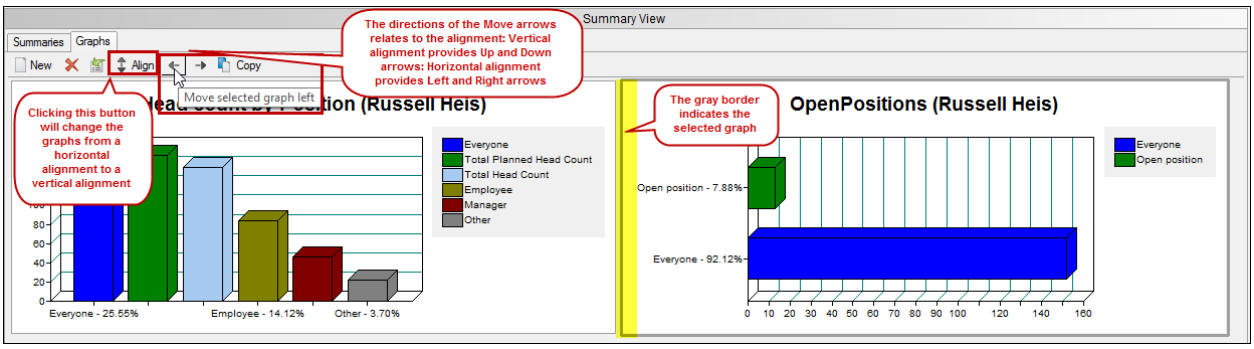


Figure 123.

Formulas

Formula fields allow users to define and populate a new, or existing, custom field based on values provided in other custom fields or using other criteria. For example:

- indirect reports managers
- years of employment
- days until an appraisal is due
- percentage of sales quota met
- new salary based on a percentage increase

OrgPublisher Premier supports formula fields by using the *Windows Scripting Host* to process VBScript. The VBScript function references values in custom fields and produces results in other custom fields.

Items to remember about using formulas:

- Formulas are processed when the chart is opened and when closing the Custom Field Properties dialog
- Formulas are only processed by the OrgPublisher Premier application or OrgPublisher Premier via Web Administration
- Formulas do not refresh in response to a data edit or structure change
- Formulas are not processed in any Planning charts
- Formulas are not processed when a user opens a published chart. The chart shows the data as calculated prior to publishing. This limitation only applies to formulas that reference the current date.
- Formulas cannot be applied to the following fields when these fields are used in the Levels and Span of Control feature.

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- Direct report
- Level number
- Levels below
- Count
- Sum
- Ave

Inserting Formulas

To insert a formula using OrgPublisher Premier:

1. On the toolbar, click the Custom Fields Properties dialog button  .

   The Custom Field Properties dialog opens.

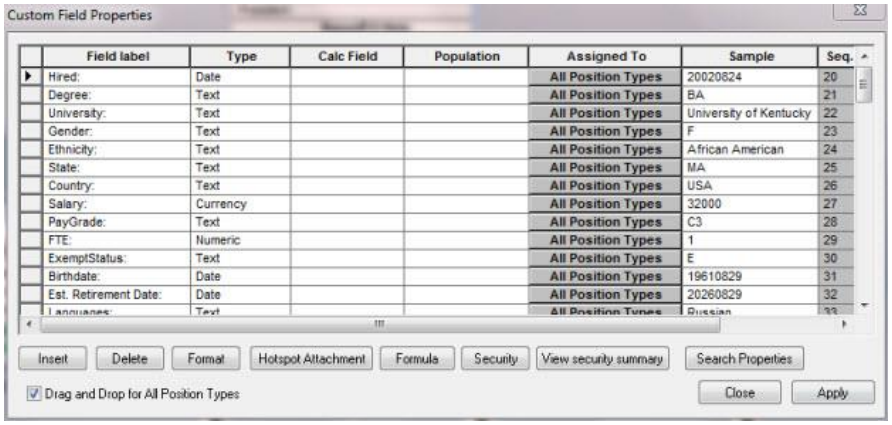


Figure 124.

2. Place your cursor at the end of the **Field label** column, and click **Insert**.
3. Type in the **Field label**, **Type** of data, and then click the **Formula** button.

   The *Formula* dialog opens.

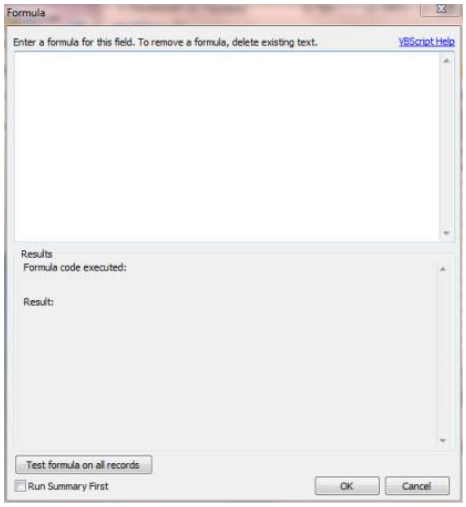


Figure 125.

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The control fields in the *Formula* dialog are:

Control	Description
Formula window	Allows entry of a formula. If blank, the field will not have a formula. After every keystroke, the Formula code executed section will be updated.
Results section	Formula code executed: Shows code type in the above area. Result: Shows the return value of the formula for the first record
Test formula on all records button	Runs the formula against all records in the chart. This is useful for discovering data errors due to missing or unacceptable field values.
Run Summary First check box	When selected, runs the summary engine before executing the formula.

You can type the formula directly into the *Formula* dialog, or copy and paste it from a text file.

4. Click the **Test formula on all records** button.

   If the formula works, OrgPublisher displays a message stating that no errors were found.

   If errors are found, you must modify, or fix, the formula before it can be used in the chart.

   To remove a formula, delete all the existing text in the dialog.

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Publish Charts

OrgPublisher offers several publishing options, as well as associated tasks.

Note: Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration **SourceCharts** folder.

1. Log on the server as an administrator or power user.
2. Open the desktop OrgPublisher application. (If default install is used, the location is **c:/program files/orgpubx**).
3. Open the chart (found in the **SourceCharts** folder).
4. Schedule the publishing definition in OrgPublisher using the **Schedule**s tab.

Also, when you are publishing to ECharts, you must manually schedule the **BAT** file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job

Topics Pertaining to this Section	
Choosing a Publishing Format	Enabling Copy Option in a Secured Chart
Publishing a Directory View	Enabling Publish Notification Email
Publishing in EChart Rich Client Format	Enabling Save As in Published Charts
Publishing in EChart Thin Client Format	Enabling Send to PDF in Published ECharts
Publishing in Graphic Format	Enabling the Succession Planning Option
Publishing in HTML Format	End User Accessibility
Publishing in PluginX Format	Exporting Change Data
Publishing a Cross Browser Chart	Formatting Cross Browser/Silverlight Charts
Publishing Real-Time Charts	Overwriting Existing HTML and JS Files
Publishing a Chart for Org Modeling or Succession Planning	Scheduling an EChart to Publish
Changing a Publishing Definition	Securing EChart Toolbars and Buttons
Choosing EChart Thin Client Settings	Selecting a Color Scheme for Published Charts
Choosing PDF Font and Image Settings	Selecting Advanced Cross Browser View Options
Choosing PDF Paper Settings	Selecting Chart Action Button Options
Creating a Publishing Schedule	Selecting EChart Security Options
Defining and Using Custom Colors	Sending the Published Chart to FTP Server
Deleting a Publishing Definition	Setting Change Report Default Options

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Topics Pertaining to this Section	
Enabling Action Buttons	Showing or Hiding Toolbar Buttons in Silverlight
Enabling a Visual Change Indicator	Using a Virtual Directory
Enabling/Disabling Functions	
Publishing a Planning Chart to Cross Browser	

Choosing a Publishing Format

You can choose one of several formats to publish your chart in OrgPublisher. These formats publish charts that fall into one of two categories, an interactive chart or an org chart document.

Interactive choices include PluginX and EChart.

Format	Browser	Platform
PluginX	OrgPublisher PluginX to view with Microsoft Internet Explorer 6.0 and later.	Windows
EChart	To publish to a Microsoft IIS or ISAPI-compliant Windows® 2000, Windows® XP, Windows® 2003 web server, or Apache™ HTTP Server 2.0+ running Windows. Offers both thin and rich client formats.	Windows
Cross Browser - Silverlight	For interactive, animated cross browser and cross platform publishing.	Cross
HTML	For cross platform publishing.	Cross
Graphic	To publish in a static graphics format.	Cross
PDF	To publish a chart in a portable document format file.	Cross
iPad	To publish employee data to OrgPublisher Executive	Apple® iPad® mobile digital device

Org chart documents include HTML, graphic, and PDF.

Format	Browser	Platform
PDF	OrgPublisher PluginX to view with Microsoft Internet Explorer 6.0 and later.	Cross
HTML	To publish to a Microsoft IIS or ISAPI-compliant Windows® 2000, Windows® XP, Windows® 2003 web server, or Apache™ HTTP Server 2.0+ running Windows. Offers both thin and rich client formats.	Cross
Graphic		Cross

Org Chart Document options:

PDF - When you select this option, you can choose chart styles and the top of chart box, and print in Book style. In addition, this is the EChart thin client printing option. End users must have the Adobe® Acrobat® Reader® 9 software installed on their PCs.

HTML - When you select this option, the published chart can contain basic interactive elements, such as drilling, hotspots, displayable views, and the e-mail to a group feature.

Graphic - When you select this option, the published chart is a static document, such as a JPG, that can be viewed on a browser.

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Choosing Between Express and Advanced Mode Publishing

When publishing a chart in OrgPublisher, the *Publishing Wizard* lets you select Express Mode or Advanced Mode. Your choice depends on your needs for a particular published chart and its audience.

Express Mode enables you to quickly publish a chart in PluginX, directory view, or PDF. You can type the chart name and choose a "publish to location" and immediately publish a chart.

Advanced Mode walks you through each of the wizard dialogs, enabling extensive choices for publishing format, enabling the publishing notification e-mail, selecting planning or succession chart options, end users toolbar and button options, end user context menu commands, allowing end user personalization, enabling visually impaired support, chart security, publish to iPad, and more.

Choosing a Cross Browser Option

The Publishing Wizard allows you to publish an interactive chart which enables end users to perform several tasks, such as conducting detailed searches and creating their own groups. An org chart document provides fewer end user features.

Published chart features, including multiple viewing levels, chart searches, ad hoc groups, Smart Links, or print preview, are not available when publishing to an org chart document. Org chart documents are, however, cross-platform publishing options.

Cross Browser - When you choose this publishing format, you can publish a chart that is viewable across all platforms. There are two cross browser options.

- Thin client - This option is compatible with browser that support HTML and JavaScript. The chart provides searching, drilling, and view options, but does not provide a rich user experience.
- Microsoft Silverlight - This option is compatible with all browsers that support Silverlight. The chart provides searching, drilling, and view options in a rich user experience, with the use of interactive features, such as animation.

Publishing in Express Mode

1. Open the Publishing Wizard.
2. Accept the default selection of **Express Mode**. Click **Next**.
3. Select an express publishing mode.
4. Type the **Name of Chart**.
5. Type or **Browse** to the chart publish to **Location**. Click **Finish**.

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Selecting an Express Mode Publishing Option

When you choose the Express Mode publishing option in the Publishing Wizard, you are prompted to select the type of express publishing you want. Options include:

Publishing Option	Description
Chart	Publishes a chart that can be viewed with Internet Explorer. (PluginX)
Chart with directory	Publishes a chart that includes a directory view of the organization. (telephone list)
PDF	Publishes a chart to a PDF document.

Publishing a Directory Version of the Chart

With OrgPublisher you can publish a chart for Directory View. This additional html file opens the Search View as a directory for the published PluginX or EChart rich client chart.

> **Note:** When you select a base group filter when searching for and creating groups, you also limit the records displayed in the published directory view of the chart.

Express Mode

1. Click the Publish button 

in the toolbar or select **Tools** from the Main menu then **Publishing Wizard** from the options list. The *Publishing Wizard* opens.
2. Select the **Express Mode** radio button. Click **Next**.
3. Select the **Chart with directory view** radio button.
4. Type the **Name of Chart**.
5. Type or **Browse** to the **Location** where you want to store the chart.
6. Click **Finish** to publish the chart directory.

Advanced Mode

1. If you choose to publish using the **Advanced Mode**, select **Interactive Org Chart**.
2. Make your selection of either PluginX or EChart and follow the wizard dialogs until you reach the multiple subject dialog that includes the directory view option.
3. Select the **Create directory view for chart** check box.
4. Complete the *Publishing Wizard* and then open the published chart.

   You can access the directory view by clicking on the file name in the *Publishing Summary* message, or add an underscore and "dir" (_dir) to your chart name in the Address field in your browser and press Enter, for example, \Creative Print_Dir.htm. If you are publishing to EChart thin client, the name is **\Creative Print_TDir.htm**. The directory view opens.

   End users can click on a name and OrgPublisher displays the Smart Links options list. The end user selects the required link, such as **E-mail** or **Go to person in chart**. If there is no link provided, OrgPublisher automatically opens to the person in the chart.

   End users can also use the Search View features, such as the **Groups** and **My groups** tab, as well as the e-mail, save as, and viewing the list in Microsoft Excel options.

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Publishing in EChart Rich Client Format

Rich client is an option of EChart publishing and uses the OrgPublisher PluginX for a more flexible end user experience. EChart publishing may affect other processes running on the server. You can also schedule your published chart to automatically publish at a specified date and time.

Note: The EChart HTM file must be closed in order to publish successfully. If it is open when you attempt to publish the EChart, an error message displays stating that access is denied. Simply close the file and publish again.

This notification is sent only if the OrgPublisher is not being run interactively.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list.

   If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview.

2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.
3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.
4. Accept the default **Interactive Org Chart** selection. Click **Next**.
5. Select the **EChart** radio button. Click **Next**.
6. The next dialog verifies that your chart will benefit from publishing an EChart.

   If the wizard determines that your chart will not benefit from this option, it is recommended that you click **Back** and select a different publishing format. If your chart will benefit using the EChart option, click **Next**.
7. In the **Publish to location**, type or **Browse** to the location where you want to publish your org chart.
8. If you want to write over your existing information, select the **Overwrite existing HTML and JS** files check box.
9. Select the Send to web server (FTP) check box if you want to transfer your chart to your intranet. Click **Next**.
10. In the **Client Type** section, select one of the options, **Rich client using PluginX**, Thin client, or **Both client options above**. Click **Next**.
11. Type the **URL (http://SiteName)** of the virtual directory on your web server. This is necessary to locate the EChart server for this chart.
12. Select the **Maximum chart levels** to display in your published EChart. Click **Next**.
13. Select a chart security option to assign to your published EChart. If you have already set security on your selected custom fields, proceed to make your security selections in this dialog. If you have not secured your custom fields and need to, close the wizard and open the Custom Field Properties dialog to secure fields. Click **Next**.

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14. Select the **Chart Style** you want the published chart to display first by clicking on the down-arrow and choosing a style from the options list.
15. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.
16. If applicable, select Enable Publish Notification E-mail and associated fields. Click **Next**.

    Note: When you select this option, publishing will stop when a data error is detected. If you do not want to stop publishing in the event of an error, a registry setting must be changed. Contact the Support Team for assistance.

17. Select a color scheme for the published chart. Click **Next**.
18. Select the toolbars and buttons you want to secure in your published chart. Click **Next**.
19. Select one or both of the planning options, Enable Organizational or Succession Planning, if you want to enable web-based planning in the published chart. Click **Next**.
20. Select the context menu commands for chart action buttons in the published chart. Click **Next**.
21. If you are publishing your chart using a different "top of chart" than the actual top box in the chart, you can select the **Exclude positions above** check box if you do not want your end users to drill-up in the chart.
22. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the Search View columns. See the Publishing a Directory Version of the Chart procedure in this document for detailed information.
23. If you want to allow the rich client chart to be personalized by the end user, select the **Remember each user's navigation and interface changes** check box.
24. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.
25. Choose what you want OrgPublisher to do in the case that a hotspot link is not found in the chart; **Navigate to the top box in the chart** or **Not display the chart**.
26. You can choose to use your own PluginX help for your published chart by typing the file name and location in the **PluginX Help URL** field which users can access by clicking the question mark in the OrgPublisher toolbar. Click **Next**.
27. In this dialog you can set the **Maximum number of e-mail recipients in Search View**. The default is 20, but you can change that, depending on your system.
28. If you want to publish your chart for accessibility by JAWS assistive software, select the **Enable support for the visually impaired** check box. Click **Next**.
29. If you want to set up an archive schedule now, select the Keep an archive of this chart check box. Click **Next**.

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30. Select:
    - **Publish now** to publish your EChart immediately. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.
    - **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept.

    To schedule your EChart to publish at a later time, use Microsoft Task Scheduler.

Selecting EChart Security Options

When publishing in EChart format, you can select from several security options. If you choose not to secure ECharts, they can be accessed by any chart user, as well as any user who can access the server where the EChart resides.

1. **Select a chart security option** radio button and complete accompanying fields.
    - **Unsecured** - This radio button is the default selection and allows all users to view the entire chart and its contents.
    - **Active Directory® authentication** - Select this radio button to allow only users who have Windows NT access and who are actually located in the chart to access the chart.
    - **System user ID /box linkage (not secure)** - Select this radio button if you want to give any user ID on the user machine access to the chart. This is not a secure setting. The chart will open at the user's box.
    - **Chart**- Select this radio button to require users to type an ID and password to open and view the chart. This option can be used for single sign-on.

        – Select the **Password field** from the pull-down list where OrgPublisher can find your password information. This must be stored in an Input File custom field record.
    - **Reverse proxy** - Select this radio button when you can supply the user ID in HTTP header. This option can be used with portals for single sign-on.

        – Accept the **Variable** default of **USER_ID**, or type a new variable.
        – Select the Passed as a cookie radio button, if applicable.
2. Select the **User ID** field using the down-arrow.
3. Choose the **Format of User ID** field, such as **User ID only**, **Domain\UserID**, or **domain.company.com /UserID**.
4. In the **Starting box in chart** section, select the radio button of the box from which the security check will begin.
    - **Top of chart** - Select this radio button to open the chart at the original top of chart box, displaying all levels in the chart.
    - **Supervisor's box** - Select this radio button to open the chart at the user's supervisor's box, displaying all levels from that point downward.
    - **User's box** - Select this radio button to open the chart at the user's box, displaying all levels from that point down.

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- **Box ID in this field** - Select this radio button to open the chart at a top of chart box other than the previous options. Use the down-arrow to make your selection in the adjacent field.

5. The **Allow users to drill up from starting box** check box is the default selection, and allows users to navigate to levels above their box in the chart.

   Clear the check box if you do not want users to navigate above their own chart level.

6. Continue with the Publishing Wizard.

Scheduling an EChart

You can schedule or reschedule an EChart to automatically publish using Microsoft Windows Task Scheduler. Task Scheduler prompts you to provide a user ID and password, which verify that you have the necessary access rights to run the scheduled task. You must be a member of the local **Administrators group** on the computer executing the task.

The EChart .htm file must be closed in order to publish successfully. If it is open when you attempt to publish the EChart, an error message displays stating that access is denied. Simply close the file and publish again.

1. Publish your EChart, Rich Client or Thin Client, using the Publishing Wizard. This creates a batch file.
2. Run the batch (BAT) file. This file assumes that publishing and server processing occur on the same machine.

   You can modify the batch file (BAT) produced by the *Publishing Wizard* in order to publish to a location other than the web server. Doing this may minimize chart "down time" if your chart is extremely large (200,000+ records) or if resources are limited on the web server. EChart publishing is very CPU intensive and may affect other processes running on the server.

   The batch file must be modified after you publish, so that the following steps occur in this order:

   - Move the EChart files to the server (if not publishing directly to the server).
   - Unload the EChart from the server's memory.
   - Reload the EChart into the server's memory.

   Note: The batch file will not be overwritten during publishing, so any modifications you make will be preserved.

3. Open the Microsoft Task Scheduler from the **Control Panel** in Windows 2000 and Windows XP (or from **My Computer** in Windows NT).
4. Double-click **Scheduled Tasks**. The *Scheduled Tasks* window opens.
5. Double-click **Add Scheduled Task** and follow the wizard prompts to set up the batch file as a scheduled task.

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Securing EChart Toolbars and Buttons

If you publish an EChart rich client, you can secure role-based toolbar buttons based on groups.

Note: If your chart contains only one group, the lock icons are disabled in the Publishing Wizard.

1. Create any groups needed to secure toolbar buttons.
2. Follow the *Publishing Wizard*, choosing the EChart rich client after selecting the **Advanced Mode** option.
3. When you reach the toolbar button selection dialog, open locks appear to the left of each securable button and view.

   As a default, all buttons are selected to display in the chart. Clear check boxes for all fields you do not want to display in the chart.
4. Hover over the lock to display security options.

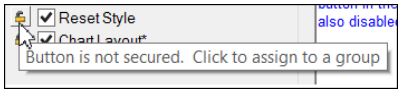


Figure 126.

5. Click on the lock to display the available groups.

   Select individual groups or click on **(Select all groups)** to include all group results.

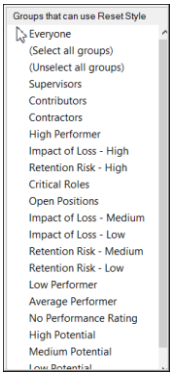


Figure 127.

6. After selection, the lock appears closed and the button displays a filled check box, indicating that it is available for the restricted viewing audience.

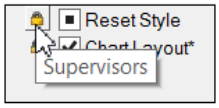


Figure 128.

Only users who are in the selected groups have access to the locked buttons when they access the published EChart.

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Publishing in EChart Thin Client Format

The thin client is an option in EChart publishing. EChart publishing may affect other processes running on the server. Thin client publishing is a manual process and cannot be scheduled to automatically publish.

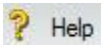
> **Note:** If your EChart contains secured fields, it is recommended that you either do not publish your chart in thin client format or that you do not use conditional formatting on secured fields.
>
> Hierarchical custom field security can significantly slow the length of time to publish the thin client.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then Publishing Wizard from the options list. The *Publishing Wizard* opens.
2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.
3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.
4. Accept the default **Interactive Org Chart** selection. Click **Next**.
5. Select the **Cross Browser** radio button. Click **Next**.
6. Select the **Thin client** radio button. Click **Next**.
7. In the **Publish to location**, type or **Browse** to the location where you want to publish your org chart.
8. If you want to write over your existing information, select the **Overwrite existing HTML and JS files** check box.
9. Select the Send to web server (FTP) check box if you want to transfer your chart to your intranet. Click **Next**.
10. Type the **URL (http://SiteName)** of the virtual directory on your web server.
11. Select the **Maximum chart levels** to display in your published EChart. Click **Next**.
12. Select a chart security option to assign to your published EChart Thin Client chart. Click **Next**.
13. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.
14. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.
15. If applicable, select the Enable Publish Notification E-mail check box. Click **Next**.
16. Select a color scheme for the published chart. Click **Next**.
17. Select the toolbars and buttons you want to enable in your published chart. Click **Next**.

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18. If you are publishing your chart using a different "top of chart" than the actual top box in the chart, you can select the **Exclude positions above** check box if you do not want your end users to drill up in the chart.
19. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the Search View columns.
20. If you want to allow the thin client chart to be personalized by end user, select the **Remember each user's navigation and interface changes** check box.
21. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.
22. Choose what you want OrgPublisher to do in the case that a hotspot link is not found in the chart; **Navigate to the top box in the chart** or **Not display the chart**.
23. You can choose to use your own published chart help by typing the file name and location in the **URL for a PluginX help file** field which end users can access by clicking the Help  button in the OrgPublisher toolbar. Click **Next**.
24. The next dialog contains several Thin Client default selections, which you may override by clearing the options. Click **Next**.
25. If you want to set up an archive schedule now, select the Keep an archive of this chart check box. Click **Next**.
26. Select:
    - **Publish now** radio button to publish your EChart immediately. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.
    - **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept.

    To schedule your EChart Thin Client to publish at a later time, use Microsoft Task Scheduler. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.

    Note: Due to several possible network issues, it is recommended that you hide all photos before publishing as thin client. In addition, logos are not supported when published as thin client, and do end users do not have access the My groups tab available in the Search View.

Choosing EChart Thin Client Settings

When publishing your chart in EChart thin client, you can accept default settings, or select settings of your own when the Publishing Wizard reaches the next to the last dialog. EChart thin client settings help you publish a chart that will look good and work within your browser, but can also enable end users to print the chart.

Choices include enabling JavaScript, choosing JPEG or GIF graphics, using a cascading style sheet, enabling PDF printing, and optimizing images.

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Settings	Description
Enable JavaScript	Accept this default selection to allow end users to close and reopen views, as well as perform searches on numeric fields. Clearing this option prohibits end users from closing views and forces them to search using the **All fields** options.
Enable end users to print charts via PDF files	Accept this default selection to provide end users with a "book style" print option for the chart. Clearing this option forces end users to use the browser **Print** button in order to get a hard copy of the chart, which only prints what displays in the browser window.
JPEG	Accept the default selection of JPEG if your chart contains photos, background or box color gradients, or background images.
GIF	Selecting the GIF radio button will provide a published chart with clearer text quality, but will display lower quality photos and graphics.
Use optimized toolbar and button images	You may be able to improve performance by caching static images. When enabling this option, the **ChartImages** subfolder, in the **OrgPubX** folder, must be copied to the destination web folder.
Cascading Style Sheet	You can type a path to your corporate or custom cascading style sheet you want to use with this thin client chart.

Two cascading style sheets are available with the OrgPublisher installation, and can be found in the **css** subfolder of the **OrgPubX** folder.

Selecting Role-based Toolbars

If you publish an EChart rich client, you can secure role-based toolbar buttons based on groups.

Note: If your chart contains only one group, the lock icons are disabled.

1. Create any groups needed to secure toolbar buttons.
2. Create a publishing definition for an EChart rich client after selecting the **Advanced Mode** option in the Publishing Wizard.
3. When you reach the toolbar button selection dialog, open locks appear to the left of each securable button. Click on the lock to display security options.


Publishing Wizard
Select the toolbars and buttons you want enabled.
Style selector
Status bar
Main toolbar
Save as
Copy"
Go to top"
Search
Toolbar search"
Zoom to point"
Zoom factor"
PowerPoint"
Print
Print preview"
Button is not secured. Click to assign to a group
Display whole chart
Drilling on/off
Displayed levels
Large About box button
Reset Style
Chart Layout"
Views toolbar
Style view
Tree view"
List view/Search view
Profile view
Summary view
9-Box view
Enable PluginX Copy"
Enable opening the search results in Microsoft Excel"
"Not applicable for thin client
You can select which buttons and toolbars to enable in the published chart. The items noted with an asterisk (* are available in EChart thin client charts.
The Views toolbar provides the most flexibility to end users. PluginX Copy affects right-click menus and Copy buttons in the Chart, List, and Search Views. If you disable the PluginX Copy option, the Copy button in the toolbar is, in effect, also disabled.
< Back
Next >
Cancel
Help

Figure 129.

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4. Right-click on the lock to display the available groups. Click to select individual groups or click on **(Select all groups)** to include all group results.



Figure 130.

After selection, the lock appears closed and the button displays a green filled check box indicating that it is available for the restricted viewing audience.

Only users who are in the selected groups have access to the locked buttons when they access the published EChart.

Configuring EChart Multiple User Selections

When publishing a secured EChart, there may be multiple occurrences of end user ID records; for instance, an employee reports directly to a manager, but also participates in a project team and, therefore, also has an indirect reporting relationship to the project leader. When this occurs, the end user can select which occurrence to use when opening the chart.

You can choose which fields the end user can see when making the user ID record selection.

1. Click **Options** in the Main menu then **EChart security options** from the options list. The *EChart Multiple Instance User Configuration* dialog opens.
2. Select the check box for each field you want the end user to see, such as **Name of user's manager**, **First name**, **Last name**, **Job Title**, and more.
3. When you have finished your selections, click **OK**. The dialog closes.

   When opening an EChart, end users are shown the Select User Instance dialog to choose which instance to use when accessing the chart. The dialog states that the user ID is assigned to multiple records in the chart and one of the displayed instances must be chosen to view the chart. The information you select to display helps them make the right decision.

Publishing in Graphic Format

A chart published as a graphic is in JPG format, which can be read by most browsers and graphics programs.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens.
2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.
3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****),

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question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.

4. Select the **Org Chart Document** radio button. Click **Next**.
5. Select the **Graphic** radio button. Click **Next**.
6. Type or **Browse** to the location where you want to publish your org chart.
7. Select the Send to web server (FTP) check box if you want to transfer your chart to your intranet. Click **Next**.
8. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.
9. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.
10. If applicable, select the Enable Publish Notification E-mail check box. Click **Next**.
11. Select the
    - **Publish now** radio button to publish your EChart immediately. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.
    - **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept.
    - **Schedule Now** to set up a publishing schedule.

    Click **Finish**.

Publishing in HTML Format

You can also schedule your published chart to automatically publish at a specified date and time.

HTML charts can be published with the List View or Profile View that are displayed when you publish a chart on your intranet.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens. Click **Next**.
2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again.
3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.
4. Select the **Org Chart Document** radio button. Click **Next**.
5. Select the **HTML** radio button. Click **Next**.
6. Type or **Browse** to the location where you want to publish your org chart.

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7. Select the Send to web server (FTP) check box if you want to transfer your chart to your intranet. Click **Next**.
8. If you selected **Send to web server (FTP)**, the FTP Server dialog displays. Type the required information to publish the chart to your intranet. Click **Next**.
9. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.
10. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.
11. When you select the Enable Publish Notification E-mail check box. Click **Next**.
12. The **Enable Drill-up/Drill-down** check box is automatically selected and generates multiple HTML pages.

    You can navigate through your chart with Drill-Up/Drill-Down buttons. The number of HTML files that are generated is based on the number of levels you set.

    When you include hotspots in your chart, a client-side image map is created. Because the file's image map is part of the HTML document, files in this format can be read more quickly.
13. If you have included photos in your chart, it is recommended that you select the **Use JPEG graphic** format check box. Click **Next**.
14. Select:
    - **Publish now** publish the chart immediately and to save it to the location you specified. A *Publishing Summary* message displays a link to the published chart.
    - **Publish later** to open the *Publish charts* dialog. The chart is not published, but the publishing definition is saved.
    - **Schedule now** to set up a publishing schedule.

    Click **Finish**.

Publishing in PDF Format

You can publish your chart as a PDF (Portable Document Format) in Book Style print format.

Note: When working with a published chart in PDF format, end users must use Adobe® Reader® 9 and later to effectively open email links. OrgPublisher will install this free reader if it cannot find it on the end user's operating system.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. The Publishing Wizard opens. Click **Next**.
2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again.
3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.

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4. Select the **Org Chart Document** radio button. Click **Next**.
5. Select the **PDF** radio button. Click **Next**.
6. Type or **Browse** to the location where you want to publish your org chart.
7. Select the Send to web server (FTP) check box if you want to transfer your chart to your intranet. Click **Next**.
8. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.
9. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.
10. When you select the Enable Publish Notification E-mail check box. Click **Next**.
11. Select the book style settings for the PDF chart. Click **Next**.
12. Select the PDF paper settings you want to use. Click **Next**.
13. In the *Settings* dialog, select the PDF font and page format settings you want to use. Click **Next**.
14. Select the radio button for when you want to publish.
    - **Publish now** to publish the chart immediately and save it to the location you specified. A *Publishing Summary* message displays a link to the published chart.
    - **Publish later** to open the *Publish charts* dialog. The chart is not published, but the publishing definition is saved.
    - **Schedule now** to set up a publishing schedule.

    After the PDF conversion is complete a message displays the number of chart pages created. The PDF chart file is saved to the **WEB** folder in the OrgPublisher directory. End users can view and print the chart as a Book style PDF.

    Click **Finish**.

Choosing PDF Font and Image Settings

When publishing your chart in PDF format or printing an EChart thin client chart, OrgPublisher defaults to several settings. These include chart, paper, font and image choices.

Font embedding and images can affect the size of the PDF file which, in turn, can affect the response time.

Settings	Description
Font Embedding	OrgPublisher defaults to the **Font Embedding** check box. Embedding fonts used in the creation of the chart into the published PDF ensures that the end user sees the chart text just as it is in the original chart. If you have concerns about the size of the file (font embedding significantly increases the file size) you can clear the option.
Printer Resolution	The default **Printer Resolution** is set to **600 DPI**, but you can select another option from **72 DPI** to **1200 DPI**.

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Settings	Description
	DPI means dots of ink (or toner) printed per inch of full-color and gray-scale images. The higher the resolution, the more detailed the image.
Remove Duplicate Images	If you accept the default, OrgPublisher will **Remove Duplicate Images**. If you must keep duplicate images in the PDF chart, clear this check box.
Downsample high-resolution images	OrgPublisher defaults to **Downsample high-resolution images** when creating the PDF file. If you want to keep high-resolution images, clear this check box. High-resolution images provide sharper graphics but can also increase the file size or take a longer to display.
JPEG Compression	If you are concerned about the PDF file size and the sharpness of graphics in your PDF chart is not a high priority, you can select the **JPEG Compression** check box.

Once you've published the chart, a dialog displays the progress of the PDF conversion. After the conversion is complete a message displays the number of chart pages created.

Choosing PDF Paper Settings

When publishing your chart in PDF format or printing an EChart thin client chart, OrgPublisher defaults to several settings. These include chart, paper, font and image choices. You can choose several paper settings, such as paper size, page orientation, and page margins; but you can select other options.

Settings	Description
Paper Size	You can choose the paper size you want for the PDF chart. The default is **Letter 8 1/2 x 11 in**. You can select **Legal 8 1/2 x 14 in**, **A4 210 x 297 mm** (International/European paper size, roughly 8.27 x 11.69 in) or **A3 297 x 420 mm** (International/European paper size, roughly 11.69 x 16.54 in).
Page Orientation	You can choose the page orientation that will best display your PDF chart. The default is **Landscape** but, depending on the layout selected, you can choose **Portrait**.
Margins (in tenths of millimeters)	You can choose the page margins (in tenths of millimeters) that will best display your PDF chart. The default margins are **Horizontal 60** and **Vertical 60**. Type over the numbers if you want to change them.

Once you've published the chart, a dialog displays the progress of the PDF conversion. After the conversion is complete a message box displays the number of chart pages created.

Publishing in PluginX Format

You can also schedule your published chart to automatically publish at a specified date and time.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard. Click **Next**.
2. If your published chart does not require specific selections, select the **Express Mode** radio button and follow the Publishing in Express Mode procedure.

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If your published chart requires selections, such as planning or available toolbars, select the **Advanced Mode** radio button. Click **Next** and click **Next** again.

3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (**** or **/**), colons (**:**), asterisks (*****), question marks (**?**), quotation marks (**"**), and greater than or less than symbols (**<** or **>**). The publishing definition name can be up to 255 characters. Click **Next**.
4. Accept the default **Interactive Org Chart** selection. Click **Next**.
5. Accept the default **PluginX** selection. Click **Next**.
6. Type or **Browse** to the location where you want to publish your org chart.
7. If you want to write over your existing information, select the Overwrite existing HTML and JS files check box.
8. Select the Send to web server (FTP) check box if you want to transfer your chart to your intranet. Click **Next**.
9. Select the **Chart Style** you want the published chart to display first by clicking the down-arrow and choosing a style from the options list.
10. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.
11. If applicable, select the Enable Publish Notification E-mail check box. Click **Next**.
12. Select a color scheme for the published chart. Click **Next**.
13. Select the toolbars and buttons you want to display in your published chart. End users can utilize buttons on these toolbars to view more of the chart data and to navigate through it. Click **Next**.
14. Select one or both of the planning options, Enable Organizational or Succession Planning, if you want to enable web-based planning in the published chart. Click **Next**.
15. Select the context menu commands for chart action buttons in the published chart. Click **Next**.
16. If you are publishing your chart using a different "top of chart" than the actual top box in the chart, you can select the **Exclude positions above** check box if you do not want your end users to drill-up in the chart.
17. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the Search View columns. See the Publishing a Directory Version of the Chart procedure in this document for detailed information.
18. If you want to allow the rich client chart to be personalized by the end user, select the **Remember each user's navigation and interface changes** check box.
19. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.
20. Choose what you want OrgPublisher to do in the case that a hotspot link is not found in the chart; **Navigate to the top box in the chart** or **Not display the chart**.

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21. You can choose to use your own PluginX help for your published chart by typing the file name and location in the **PluginX Help URL** field which users can access by clicking the question mark in the OrgPublisher toolbar. Click **Next**.
22. In this dialog you can set the **Maximum number of e-mail recipients in Search View**. The default is 20, but you can change that, depending on your system.
23. If you want to publish your chart for accessibility by JAWS assistive software, select the **Enable support for the visually impaired** check box. Click **Next**.
24. If you want to set up an archive schedule now, select the Keep an archive of this chart check box. Click **Next**.
25. Select:
    - **Publish now** to publish your EChart immediately. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.
    - **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept.
    - **Schedule now** to set up a publishing schedule.

    Click **Finish**.

Publishing a Cross Browser Chart Using Microsoft Silverlight

In OrgPublisher Premier, you can publish a cross browser chart that provides your end users with a richer experience using Microsoft Silverlight.

New with this version, you can publish a legend with Cross Browser/Silverlight charts. Whichever corner is chosen for the placement of the legend, the legend remains in that corner as you scroll up or down within the chart window.

Additional details can be found in the Silverlight Implementation Guides on the web site.

1. Click the Publish button 

in the toolbar to open the Publishing Wizard.
2. Select the **Advanced Mode** radio button and click **Next**. Click **Next** again.
3. Type the publishing **Name** for your chart and click **Next**.
4. Select the **Interactive Org Chart** radio button and click **Next**.
5. Select the **Cross Browser** radio button and click **Next**.
6. Accept the default selection of **Microsoft Silverlight** and click **Next**.
7. Select the viewer options you do not want to offer in the published chart. Click **Next**.
8. Accept the default selection of **Enable Search Feature** if you want your end users to be able to search for information in the published chart. Clear the selection if you do not want to make the search feature available.
9. Select up to three fields to display in the search results list. **Box Title** is selected by default. You can accept that and select two more fields, or clear the Box Title check box and select three others.

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10. If applicable, move the selected fields up or down in the list. Click **Next**.

    Field names that are preceded by an asterisk are not displayed in the application Search View and, therefore, not available to view in the published chart.

11. Accept the default Toolbar and Drop list command options, or clear the check boxes for those you do not want to enable for your end users. Click **Next**.

12. Select a position type in a specific style and properties for that position type in the desired format. Click **Next**.

13. Type the **Chart name**. If special characters are used, an error message appears to let you know that special characters are not allowed for cross browser charts. Re-enter the name without the characters.

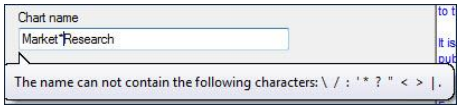


Figure 131.

14. Type or **Browse** to the **Publish to location**.

15. Select Send to web server (FTP) if you want to publish the chart using file transfer protocol. Click **Next**.

16. Type the **URL (http://SiteName)** of the virtual directory on your web server. This is necessary to locate the EChart server for this chart. Click **Next**.

17. Select an available security option for the cross browser Silverlight chart.

    - **Unsecured** - This radio button is the default selection and allows all users to view the entire chart and its contents.
    - **Windows Active Directory® authentication** - Select this radio button to allow only users who have Windows NT access and who are actually located in the chart to access the chart.
    - **Chart** - Select this radio button to require users to manually type an ID and password to open and view the chart.
    - **Reverse proxy** - Select this radio button to allow OrgPublisher to retrieve the user ID from the HTTP header variable and use it for authentication.

18. If you selected the **Chart** option, click the down-arrow in the **Password field** and select the field in the chart containing the password information. This must be stored in an Input File custom field record.

19. No matter which security option you choose, click the down-arrow in the **User ID field** and select the field in the chart that holds the unique user ID. Click the down-arrow in the **Format of User ID field** to select the user ID format.

20. In the **Starting box** in chart section, select the box where you want OrgPublisher to display as top of chart.

    - **Top of chart** - Select this radio button to open the chart at the original top of chart box, displaying all levels in the chart.
    - **Supervisor's box** - Select this radio button to open the chart at the user's supervisor's box, displaying all levels from that point downward.

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- **User's box** - Select this radio button to open the chart at the user's box, displaying all levels from that point down.
- **Box ID in this field** - Select this radio button to open the chart at a top of chart box other than the previous options. Click the down-arrow in the adjacent field to select the field you want to use.

21. The **Allow users to drill up from starting box** check box is the default selection, and allows users to navigate to levels above their box in the chart. Clear the check box if you do not want users to navigate above their own chart level.
22. Accept the **Chart Style** displayed or click the down-arrow to select another style.
23. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select **Reset starting box** to make that box the top of your published chart. Click **Next**.
24. Select Enable Publish Notification Email if you want to send an email message to someone if the chart does not publish. Click **Next**.
25. Select Keep an archive of this chart if you want to automatically create an archive for this published chart. Click **Next**.
26. Select the radio button for when you want to publish and click **Finish**.
    - **Publish now** to publish the chart immediately and save it to the location you specified. A *Publishing Summary* message displays a link to the published chart.
    - **Publish later** to open the *Publish charts* dialog. The chart is not published, but the publishing definition is saved.
    - **Schedule now** to set up a publishing schedule.

Publishing a Cross Browser Planning Chart Using Microsoft Silverlight

You can publish a cross browser planning chart by following the procedure above, and selecting a security option.

1. Follow the Publishing Wizard dialogs publish to Cross Browser Silverlight until you reach the Security Options dialog.
2. Select the security option you want to use, as well as the associated fields in the dialog.

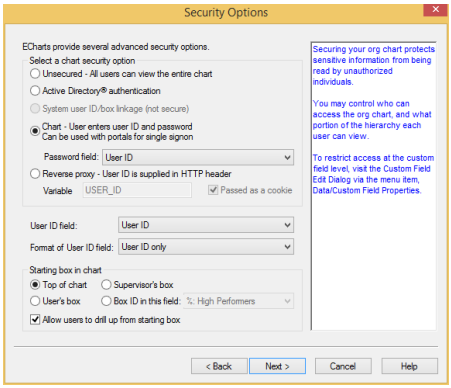

Security Options
ECharts provide several advanced security options.
Select a chart security option
Unsecured - All users can view the entire chart
Active Directory® authentication
System user ID/box linkage (not secure)
Chart - User enters user ID and password
Can be used with portals for single signon
Password field:
User ID
Reverse proxy - User ID is supplied in HTTP header
Variable
USER_ID
Passed as a cookie
User ID field:
Format of User ID field:
User ID only
Starting box in chart
Top of chart
Supervisor's box
User's box
Box ID in this field:
Allow users to drill up from starting box
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
< Back
Next >
Cancel
Help

Figure 132.

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Click **Next**.

3. Select the **Chart Style** you want to use and click **Next**.
4. The Enable Planning dialog opens with the **Enable Organizational Planning** check box selected.

   The **Planning Style** is the same as the **Chart Style** selected in the previous dialog. You can modify this selection if applicable.
5. If you have created a simpler, or **Compact Planning Style** for the planning chart, select it, as well.
6. Follow the Publishing Wizard dialogs and click **Finish**.

Formatting Cross browser/Silverlight Charts by Style and Position Type

When you publish a cross browser chart for viewing through Microsoft Silverlight, you can format the box and text by position type. This formatting is style specific, and can vary from one style to the next depending on your needs.

Follow the Publishing Wizard, choosing the Cross Browser and Microsoft Silverlight options.

1. Select your formatting options when you reach the dialog with the **Style/Position Type settings** fields.

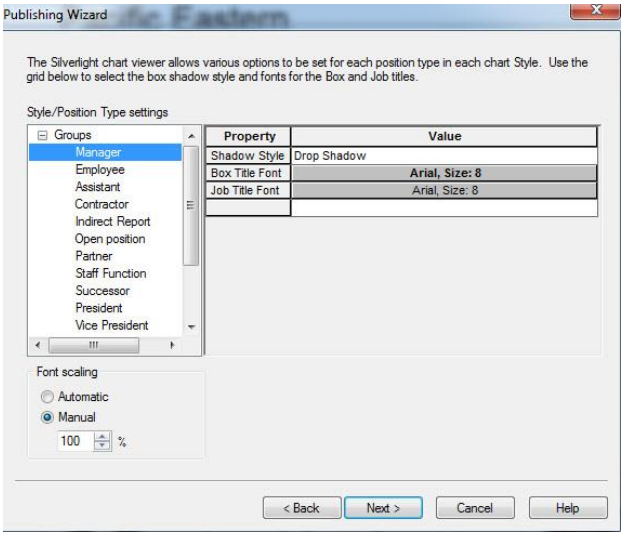


Figure 133.

2. Select the style you want to format from the left pane.
3. Select the position type you want to format within that style. Options include:
   - In the pane on the right, select the **Shadow Style** you want to use for the chart box for the selected position type.
   - Options include **Drop Shadow**, **Emboss**, **Bevel**, and **Three Dimensional**.

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4. Select the **Box Title Font** if you do not want to accept the default, Tahoma, Bold, 8; additional options are available in the *Font* dialog based on your machine fonts.
5. Select the **Job Title Font** if you do not want to accept the default, Tahoma, Bold, 8; additional options are available in the *Font* dialog based on your machine fonts.
6. Select the **Font scaling** option. You can choose **Automatic (recommended)** to let OrgPublisher do the scaling, or **Manual** if you want to do the scaling yourself.

Selecting Advanced Cross Browser Viewing Options

When publishing your cross browser chart to Microsoft Silverlight, you can enhance the end user experience. These options are all selected by default, but you can clear the check box for the option you do not want to use.

You can:

- **Animate chart navigation** - this feature provides motion to certain tasks, such as:
  - when you open a chart, it appears to "fly in" from the bottom of the window
  - when you open a style, it appears to "fly in" from the style tab in toolbar
  - when you drill through the chart, the top box appears to "float" up or down
- **Use reflective photos** - this feature displays chart photos with a slight downward window reflection effect.
- **Animate the Profile View** - this feature provides motion when the chart box flips to reveal the profile.

Showing or Hiding Toolbar Buttons in the Silverlight Chart

When you publish a chart for viewing through Microsoft Silverlight, you can choose to show end user options on the toolbar or in a drop list.

Select your menu options when you reach the **Toolbars** dialog.

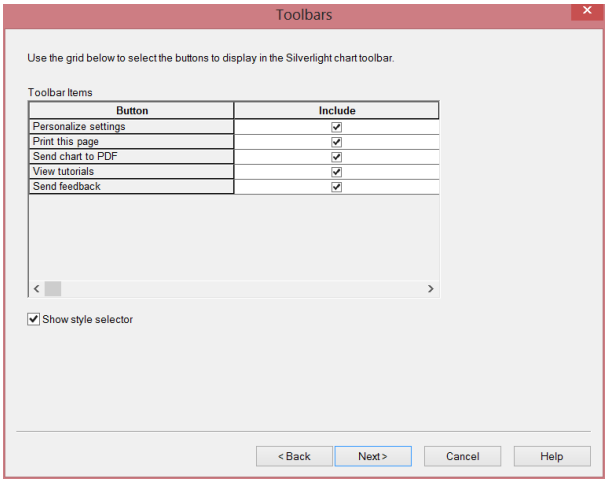


Figure 134.

1. Clear the check box in the **Include** column for any task **Button** you do not want to enable for your end users.

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2. Accept the default options, or clear the check boxes for those you do not want to enable for your end users. Options include:
   - **Personalize settings** - Allows the end user to select a color scheme and animation.
   - **Print this page** - Allows the end user to send the published chart to PDF.
   - **View Tutorials** - Allows the end user to open and view video tutorials on how to use the published chart.
   - **Send feedback** - Allows the end user to send comments via your e-mail client.
3. Accept the default of **Show style selector**, or click the check box if you do not want end users to view different styles in the cross browser chart.

Publishing Real-Time Charts

Real-time publishing is an option when publishing an EChart, either rich client or thin client, created using an ODBC connection. Real-time publishing is not available when building a chart from multiple data sources.

Real-time charts must be secured via your IIS, not through the Publishing Wizard. The security dialog is not available when you publish a real-time chart.

1. Click the Publish button 

in the toolbar. You can also select **Tools** from the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard.
2. Select the **Advanced Mode** radio button. Click **Next**. Click **Next** again at the brief description dialog.
3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (\ or /), colons (:), asterisks (*), question marks (?), quotation marks ("), and greater than or less than symbols (< or >). The publishing definition name can be up to 255 characters. Click **Next**.
4. Accept the default **Interactive Org Chart** selection. Click **Next**.
5. Select the **EChart** radio button. Click **Next**. Click **Next** again.
6. Type or **Browse** to the location where you want to publish your org chart.
7. If you want to write over your existing information, select the Overwrite existing HTML and JS files check box. Click **Next**.
8. If applicable, select the Send to web server (FTP) check box if you want to transfer your chart to your intranet. Click **Next**.
9. Select the **Both client options above** radio button. Click **Next**.
10. Select the **Use Real-Time Data** check box.
11. If you want to improve searching performance you can choose the **Use static cached data for searching** check box.

    This allows OrgPublisher to perform all searches using a "snapshot" of the data as of publishing time only. If you do not select this option, end users will search using real-time data. This may affect response time.

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12. Type the **OLE DB connect string** for the database. Click **Next**.

    If you need help building the connect string, click **Connect String Builder**. The *Data Link Properties* dialog opens at the **Provider** tab.

    Follow the Microsoft operating system instructions to select a data provider, build a connection string, and choose a data source by clicking the Help button in that dialog.

    Note: When publishing to real-time using Oracle, you MUST select the **Microsoft OLE DB Provider** for Oracle driver.

    After you select a provider, click **Next**. The *Data Link Properties* dialog opens to the **Connection** tab.

    Options may vary, depending on the provider selected. However, you MUST select the **Allow saving password** check box. This allows the password to be saved in the connection string in order to open the chart. Click **Next**.

13. Type the **URL (http://SiteName)** of the virtual directory on your web server.
14. Select the **Maximum chart levels** to display in your published EChart. Click **Next**.
15. Select a security option to assign to your published EChart. Click **Next**.
16. Select the **Chart Style** you want the published chart to display first by clicking on the down-arrow and choosing a style from the options list.
17. If you have highlighted a box in the Chart View other than the hierarchical top box, you can select Reset starting box to make that box the top of your published chart. Click Next.
18. When you select the Enable Publish Notification E-mail check box. Click **Next**.
19. Select a color scheme for the published chart. Click **Next**.
20. Select the toolbars and buttons you want to display in your published chart. Click **Next**.

    Note: The Summary View is not available in the Real-time published chart.

21. Select one or both of the planning options, Enable Organizational or Succession Planning, if you want to enable web-based planning in the published chart. Click **Next**.
22. Select the context menu commands for chart action buttons in the published chart. Click **Next**.
23. If you are publishing your chart using a different "top of chart" than the actual top box in the chart, you can select the **Exclude positions above** check box if you do not want your end users to drill-up in the chart.
24. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the Search View columns. See the Publishing a Directory Version of the Chart procedure in this document for detailed information.
25. If you want to allow the rich client chart to be personalized by the end user, select the **Remember each user's navigation and interface changes** check box.

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26. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.
27. Choose what you want OrgPublisher to do in the case that a hotspot link is not found in the chart; **Navigate to the top box in the chart** or **Not display the chart**.
28. You can choose to use your own PluginX help for your published chart by typing the file name and location in the **PluginX Help URL** field which users can access by clicking the question mark in the OrgPublisher toolbar. Click **Next**.
29. In this dialog you can set the **Maximum number of e-mail recipients in Search View**. The default is 20, but you can change that, depending on your system.
30. If you want to publish your chart for accessibility by JAWS assistive software, select the **Enable support for the visually impaired** check box. Click **Next**.
31. The next dialog contains several Thin Client default selections, which you may override by clearing the options. Click **Next**.
32. If you want to set up an archive schedule now, select the Keep an archive of this chart check box. Click **Next**.
33. Select:
    - **Publish now** radio button to publish your EChart immediately. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.
    - **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept.

    To schedule your EChart Thin Client to publish at a later time, use Microsoft Task Scheduler.

    The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.

Publishing a Chart for Org Model or Succession Planning

You can publish a web-based chart for organizational model (what-if) or succession planning using OrgPublisher Premier. Once OrgPlan charts are created, they are always in Build Mode to allow modifications to chart components.

1. Click the Publish button 

in the toolbar or select **Tools** from the Main menu then **Publishing Wizard** from the options list. The *Publishing Wizard* opens.
2. Select **Advanced Mode** and click **Next**. Click **Next** again.
3. Type the **Name** of the published chart. It can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (\ or /), colons (:), asterisks (*), question marks (?), quotation marks ("), and greater than or less than symbols (< or >). The publishing definition name can be up to 255 characters. Click **Next**.
4. Select the **Interactive Org Chart** radio button. Click **Next**.

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5. Select either the PluginX or EChart radio button.
6. Type or **Browse** to the **Publish to location**.
7. If you want to write over your existing information, select the Overwrite existing HTML and JS files check box. Click **Next**.
8. If applicable, select the Send to web server (FTP) check box if you want to transfer your chart to your intranet. Click **Next**.
9. In the OrgPlan dialog, select the **Enable Organizational Planning** and/or **Enable Succession Planning** check box. Click **Next**.
10. If you want the planning chart to record the Windows NT user sign-on ID and a comment, if supplied, for each change, click the Enable revision history check box.
11. If you want planning charts password protected, click the **Require that all planning charts be password protected** check box.
12. If you want an indicator in the chart where changes have been made, select the Show visual indicator for changes check box.
13. If you want to edit the planning change report options, click Set default options for change report to open the *Change Report Options* dialog. Click **Next**.
14. Select the context menu commands for end user action buttons you want to make available. Click **Next**.
15. If you are publishing your chart using a different "top of chart" than the actual top box in the chart, you can select the **Exclude positions above** check box if you do not want your end users to drill-up in the chart.
16. Select the **Create directory view for chart** check box if you want to publish an additional HTML file of the chart that contains only the Search View columns. See the Publishing a Directory Version of the Chart procedure in this document for detailed information.
17. If you want to allow the rich client chart to be personalized by the end user, select the **Remember each user's navigation and interface changes** check box.
18. Select either the **Open hotspots in the same browser window** or the **Open hotspots in a new browser window** radio button based on how you want end users to access the chart's hotspots.
19. Choose what you want OrgPublisher to do in the case that a hotspot link is not found in the chart; **Navigate to the top box in the chart** or **Not display the chart**.
20. You can choose to use your own PluginX help for your published chart by typing the file name and location in the **PluginX Help URL** field which users can access by clicking the question mark in the OrgPublisher toolbar. Click **Next**.
21. In this dialog you can set the **Maximum number of e-mail recipients in Search View**. The default is 20, but you can change that, depending on your system.
22. If you want to publish your chart for accessibility by JAWS assistive software, select the **Enable support for the visually impaired** check box. Click **Next**.
23. If you want to encrypt the planning chart, select the **Password protect this chart** check box.

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24. If you chose to encrypt the chart, select either the **40 bit encryption** or **128 bit encryption** option.
25. If applicable, select **Allow 'Remember my password' option in the PluginX**. Click **Next**.
26. If you want to set up an archive schedule now, select the Keep an archive of this chart check box. Click **Next**.
27. Select:
    - **Publish now** to publish your EChart immediately. The *Publishing Summary* message displays the link, or links if you also chose to publish a directory view chart, to your published charts. Click on the link to preview the chart.
    - **Publish later** to open the *Publish charts* dialog where all publishing definitions are kept.
    - **Schedule now** to set up a publishing schedule.

    Click **Finish**.

Republishing Charts

You can republish an updated chart or publish a chart you created previously, but did not yet publish.

> **Note:** If you previously published a chart with a version earlier than OrgPublisher 8, you may want to modify your publishing definition to take advantage of the new functions.
>
> If you are republishing an EChart originally published on a previous version of OrgPublisher, you must delete the EChart DLL file before republishing using Version 8 and later.

1. Select **File** from the menu bar, then **Publish** from the pull-down menu. You can also click the Publish 

button. The Publish charts dialog opens.
2. All of your publishing definitions are listed. Click the gray box to the left of the publishing definition you want to select.
3. Click **Publish** to republish the chart. The chart is published and you are prompted to preview it. Click **Yes** to preview the chart as it will be seen on the web. Otherwise, click **No**.
4. If you need to modify your chart before republishing, click **Update** to walk through the Publishing Wizard to republish.
5. Click **Publish All** to publish all of the publishing definitions for this chart. You cannot preview the charts if you select this option.

If you republish a PDF chart and are using Acrobat® Reader® 6.0, you may receive an error message. Open the Windows Task Manager dialog. In the Applications tab, select the Acrobat Reader record and click End Task then republish your chart.

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Republishing EChart Rich/Thin Client Charts

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish  button. The Publish charts dialog opens.
2. All of your publishing definitions are listed. Click the gray box to the left of the publishing definition you want to select.
3. Click **Publish** to republish the chart. The chart is published and you are prompted to preview it. Click **Yes** to preview the chart as it will be seen on the web. Otherwise, click **No**.
4. If you need to modify your chart before republishing, click **Update** to walk through the Publishing Wizard to republish. Follow the dialog prompts, and click **Publish Now** on the last dialog.
5. OrgPublisher displays the *EChart Link Summary* message. Click on the link to update and republish your chart. (The HTM link is always created when you publish an EChart. The **DLL/Frame** link is created when you publish an EChart thin client.)

General Publishing Tasks

Changing a Publishing Definition

You can modify an existing publishing definition using the *Publish charts* dialog.

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish button  in the toolbar. The *Publish charts* dialog displays at the **Publishing Definitions** tab.

   The **Name** field lists the publishing definitions for this chart. Click the gray box to the left of the publishing definition to select the one you want to change.
2. Click **Update** to walk through the Publishing Wizard for this publishing definition, modifying the desired elements.

   Note: Publishing formats cannot be changed within the *Publish charts* dialog. All publishing updates must be done within the *Publishing Wizard*.
3. Select a publishing time and click **Finish**. The new options are saved in the existing publishing definition when you save the file.

   Note: If you installed the Web Administration mode of OrgPublisher, you cannot change a publishing definition. The publishing definition and name of charts published with Web Administration must be the same.

Scheduling a Chart for Archiving or Publishing

You can schedule a date and time to archive or publish your charts. You can start the task scheduler at the end of the OrgHistory Archive Wizard. You can also use the **Archive Schedule** tab of the OrgHistory Archives dialog or the **Schedule** tab of the Publish charts dialog.

Charts published as ECharts, or using Web Administration must use Microsoft Task Scheduler to create a publishing schedule.

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1. If you select **Schedule Now** in the *OrgHistory Archive Wizard*, the OrgPublisher Automatic Task Scheduling Wizard opens when you click **Finish**. Click **Next**.
2. In the *Schedule Name* dialog, type the **Name** you want to assign to the chart. Click **Next**.
3. Select the scheduling definition you want. If this is your first schedule, only this definition displays in the list pane of the dialog. Click **Next**.
4. In the *Schedule Frequency* dialog, select the radio button that fits your scheduling needs. Options are **One time only**, **Daily**, **Weekly**, and **Monthly**. Click **Next**.
5. If you selected One time only, the next dialog prompts you to **Select the time of day** and **Select a date** using the drop-down arrows. Click **Next**.
6. If you selected Daily, the next dialog prompts you to select a frequency, such as every 2 days or **Every weekday**. You must also **Select the time of day** and **Select the date** to begin. Click Next.
7. If you selected Weekly, the next dialog prompts you to select a frequency, such as every 3 weeks. You must also **Select the time of day** as wells as **Select the days of the week** to archive. Click **Next**.
8. If you selected Monthly the next dialog prompts you to select the **Day** or specified day, such as the **First Monday**. You must also **Select the time of day** and **Select the specific months**, such as January and April.
9. In the *User ID* dialog, your login ID displays in the **Type user name** field. Complete the **Type password** and **Confirm password** fields. Click **Next**.
10. If a password is not entered, a message verifies that you want to continue. If you select **Yes**, the scheduling proceeds without requiring a password.
11. The last dialog opens if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Scheduling a Daily Job

When you schedule a chart to publish or archive, you can select how often and at what time you want the job to run.

To run the publish or archive schedule on a daily basis:

1. Select the **Schedule now** radio button and click **Finish** in the *OrgHistory Archive Wizard* or the *Publishing Wizard*. The OrgPublisher Automatic Task Scheduling Wizard opens. You can also access the task scheduling in the **Archive Schedule** tab by selecting the archive definition and clicking **Update** or **New**. Click **Next**.
2. Follow the wizard prompts until you reach the *Schedule Frequency* dialog. Select the **Daily** radio button. Click **Next**.
3. You can select the **Every x days** or the **Every weekday** radio button; for instance, the first option runs the job every 2 days, and the second option runs the job every day Monday through Friday.
4. Use the up or down arrow to **Select the time of day** to run the scheduling job, for instance 1:00:00 PM.

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5. Use the down-arrow to **Select the date** you want the job to begin, for instance 11/16/2005. Click **Next**.
6. Continue with the *Automatic Task Scheduling Wizard*. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Scheduling a Monthly Job

When you schedule a chart to publish or archive, you can select how often and at what time you want the job to run.

To run the publish or archive schedule on a monthly basis:

1. Select the **Schedule now** radio button and click **Finish** in either the OrgHistory Archive Wizard or the Publishing Wizard. The OrgPublisher Automatic Task Scheduling Wizard opens. Click **Next**.
2. Follow the wizard prompts until you reach the *Schedule Frequency* dialog. Select the **Monthly** radio button. Click **Next**.
3. You can choose the appropriate radio button to run the scheduling job on a specific day or a relative day of the month. Use the up or down-arrow to select a specific **Day of the month**, for instance 1 or 15. Use the down arrows to select a relative day, for instance **The First Monday**.
4. To **Select the time of day** to run the scheduling job, use the up or down-arrow to choose the time, for instance 1:00:00 PM.
5. To **Select the specific months** to run the scheduling job, select the appropriate check boxes; for instance to run the job quarterly you select **January**, **April**, **July**, and **October**. Click **Next**.
6. Continue with the *Automatic Task Scheduling Wizard*. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Scheduling a One Time Only Job

When you schedule a chart to publish or archive, you can select how often and at what time you want the job to run.

To run the publish or archive schedule only once:

1. Select the **Schedule now** radio button and click **Finish** in either the OrgHistory Archive Wizard or the Publishing Wizard. The OrgPublisher Automatic Task Scheduling Wizard opens. Click **Next**.
2. Follow the wizard prompts until you reach the *Schedule Frequency* dialog. Select the **One time only** radio button. Click **Next**.
3. Use the up or down-arrows to **Select the time of day** you want the schedule to run, such as 1:00:00 PM.
4. Use the down-arrow to **Select the date** you want the schedule to run, such as 11/16/2005. Click **Next**.

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5. Continue with the *Automatic Task Scheduling Wizard*. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Scheduling a Weekly Job

When you schedule a chart to publish or archive, you can select how often and at what time you want the job to run.

To run the publish or archive schedule on a weekly basis:

1. Select the **Schedule now** radio button and click **Finish** in either the OrgHistory Archive Wizard or the Publishing Wizard. The OrgPublisher Automatic Task Scheduling Wizard opens. Click N**ext**.
2. Follow the wizard prompts until you reach the *Schedule Frequency* dialog. Select the **Weekly** radio button. Click **Next**.
3. To **Select a weekly frequency**, use the up or down-arrow to choose **Every** x week, for instance, every 2 weeks.
4. To **Select the time of day** to run the scheduling job, use the up or down-arrow to choose the time, for instance 1:00:00 PM.
5. To **Select the days of the week** you want the job to run, select the appropriate check box; for instance, if you want the job to run at the beginning and middle of the week, you might select **Monday** and **Wednesday**. You can also schedule the job to run on weekends by selecting **Saturday** or **Sunday**. Click **Next**.
6. Continue with the *Automatic Task Scheduling Wizard*. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

User ID for Automatic Task Scheduler

When scheduling a publishing or archive task, the *OrgPublisher Automatic Task Scheduler* wizard presents a user name and password dialog. Depending on your company's operating system requirements, you may be able to bypass this dialog without typing the asked for information.

If you are using Microsoft® Windows®, the *User ID* dialog prompts you to type a valid user name and password in order to automatically publish or archive your chart. You must be an authorized user of Windows® to publish or archive your charts through this scheduling wizard.

Deleting a Schedule in Microsoft Explorer

1. Locate the **Scheduled Tasks** folder on your PC. In Windows 2000, this folder is found by clicking **Start** on the task bar then **Settings** and **Control Panel**.
2. Select the schedule you want to delete and press **Delete**. The schedule no longer exists.

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Defining and Using Custom Colors

In OrgPublisher you can define custom colors for boxes, backgrounds, and the chart color scheme. You can also define custom colors for a published chart when using the Publishing Wizard.

1. Select **Format** in the Main menu, then **Boxes**, **Lines**, or **Chart** from the pull-down menu. The Format dialog displays at the tab that you selected. You can also use the Format Box  button in the toolbar to modify chart boxes, or select **Options** then **Color scheme options**.
2. Select the chart component color option. For box options, you can choose background, shadow, or outline colors. For the entire chart, you can choose a background color.
3. Click to open the color grid and select **Other** to define your custom color. Select the color by clicking in the color areas and using the intensity slide. Click **Add to Custom Colors**. (Custom colors cannot be used with chart text.)

   Click **OK**.
4. Click **Apply** or **OK** to display the chart using the new color.

Deleting a Publishing Definition

1. Open a previously published chart or a chart for which you have defined and saved a publishing definition.
2. Select **File** from the Main menu then **Publish** from the pull-down menu. The *Publish charts* dialog opens.
3. In the **Charts to Publish** field select the publishing definition to remove from the list.
4. Click **Delete**. The definition no longer exists.
5. Save the chart file.

Enabling and Disabling Functions in a Published Chart

If you publish your chart in the PluginX or EChart format, you can select to enable or disable certain end user functions in the published chart. These selections are made in the Publishing Wizard and can be updated. The EChart thin client mode does not contain all toolbar options. For instance, the toolbar copy and search features are not available.

If you are publishing a secured EChart, you can select role-base toolbar buttons based on groups.

In addition, in the PluginX or EChart publishing format, you can:

- Allow end users to access different styles and groups in the Chart View by enabling the **Styles bar** in the published chart. The default is to enable access.
- Display the **Status bar** in the Chart View, which explains what the users are viewing. For instance, the position type of the person in the selected box and head counts. The default is to enable the bar.
- Enable specific functions from the **Main toolbar** such as searching, drilling, and print preview, or disable the entire toolbar by clearing that check box.

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Note: If you disable the Main toolbar, the Organizational Modeling and Succession options are not available in the published chart.

- Select specific views your end users can see, such as the Chain of Command, 9 Box Matrix View, Profile View, List View, or Search View, or disable all but the *Chart View* by clearing the **Views toolbar** check box.

  Some views are disabled, depending on the publishing format selected. For instance, thin client publishing does not provide the Tree View, and real-time chart publishing does not provide the Summary View.

- Allow end users to save a published chart, or a portion of the chart, under a different name. Select the **Save as** check box.

  The default is to allow saving the published chart. Clear the check box if you do not want end users to save any part of the published chart.

- Allow end users to preview and copy the chart into **Microsoft PowerPoint**. The default is to enable that function.

- Allow end users to print the published chart. Select the **Print** check box.

  – The default is to enable printing of a published chart. Clear the check box if you do not want end users to use OrgPublisher to print a published chart. They will still be able to use the browser print feature.
  – If you are working with a published EChart, end users will be limited to the size of the chart they are able to print.

- Allow end users to copy the published chart. Select the **Enable PluginX Copy** check box. The default is not to allow any copies in the browser while the PluginX chart is open, unless a third party copy software is used.

  The default is not to enable this function. This makes the published chart unavailable for copying, although end users can use the browser copy and paste functions.

- Choose **Enable opening the search results in Microsoft Excel** to allow end users to send the search results list to Excel. The default is to enable this feature.

Note: If you are working with a published EChart, end users will be limited to the size of the chart they are able to save.

Enabling Action Buttons

Chart action buttons are an easy way to view and access what were previously the right-click menus for each data field in the Chart View.

When this option is enabled in OrgPublisher, the chart administrator chooses the Action button options for published charts and can enable or disable the action button feature in the chart.

1. Click **View** in the Main menu.
2. If the **Show Action Buttons** option is not selected, click to enable the feature in both the application and published chart.
3. Click the checked option to disable the feature.

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Enabling a Visual Change Indicator in the Planning Chart

The Show Change icon is a visual indicator that change has occurred in the planning chart. You determine if this feature is available in a planning chart. The planner decides whether or not to actually display the icons.

A change icon appears as a small pencil icon in the upper right-hand corner when a chart box has been moved, added, or edited.

1. Click the Publish button in the toolbar. You can also select **Tools** in the Main menu then **Publishing Wizard** from the options list. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard.
2. Follow the dialog prompts, choosing to publish a planning enabled chart, until you reach the dialog allowing choices for the planning chart.

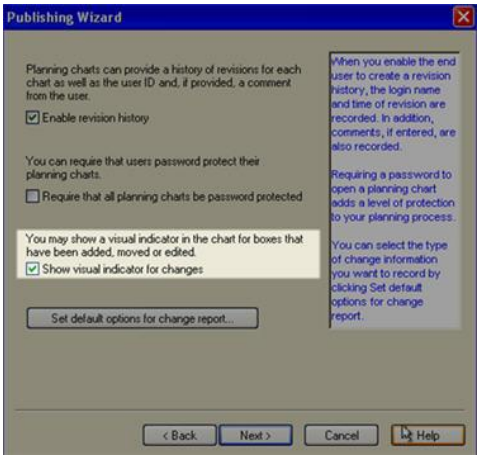

Publishing Wizard
Planning charts can provide a history of revisions for each chart as well as the user ID and, if provided, a comment from the user.
Enable revision history
You can require that users password protect their planning charts.
Require that all planning charts be password protected
You may show a visual indicator in the chart for boxes that have been added, moved or edited.
Show visual indicator for changes
Set default options for change report...
When you enable the end user to create a revision history, the login name and time of revision are recorded. In addition, comments, if entered, are also recorded.
Requiring a password to open a planning chart adds a level of protection to your planning process.
You can select the type of change information you want to record by clicking Set default options for change report.
< Back
Next >
Cancel
Help

Figure 135.

3. Select the **Show visual indicator for changes** check box.
4. Complete the *Publishing Wizard* and publish your chart.
5. In the planning-enabled chart, click **View** in the menu then **Show Change Icons**.

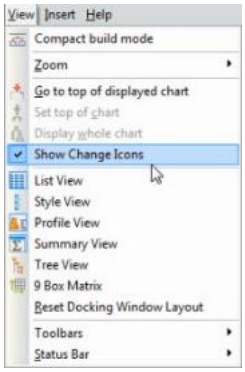


Figure 136.

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As changes are made in the chart, the icon appears (with a hover tool tip) when:

- a box has been moved
- box data has been modified
- a box has been moved and edited
- a box has been added

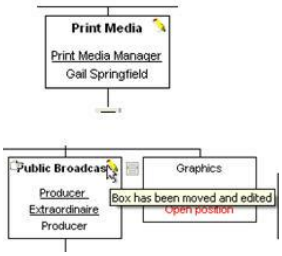


Figure 137.

Enabling the Copy Option in a Secured Published Chart

The copy option is automatically enabled when you publish an unsecured chart. However, when you publish a PluginX or EChart rich client chart, the browser print (**Alt+Prnt Scrn**) and copy features are automatically disabled ***only if***:

- the chart is secured and the PluginX copy option is disabled in the toolbar
- the chart is secured and the PluginX copy option is disabled based on the user's role

This prevents end users from taking a screen shot or copy of the published chart. When the user exits the web page containing the published chart, the print screen and copy functionality are restored. This does not, however, eliminate screen captures by users who have Snagit® or other 3rd party screen capture software installed.

If you want to restore the ability to copy the secured chart in the PluginX browser:

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish 

button in the toolbar. The Publishing Wizard or *Publish charts* dialog opens.
2. Step through the wizard dialogs and select the options you want included in this publishing definition.
3. When you reach the dialog for enabling toolbar options, select the **Enable PluginX Copy** check box, located toward the bottom of the dialog.
4. Complete the wizard to publish your chart.

> **Note:** Taking screen captures becomes unavailable system wide only after accessing the published chart. If you leave Enable PluginX Copy option unchecked in the Publishing Wizard, you can still take the screen capture system wide until you actually open the published chart.

Enabling Publish Notification E-mail

You can enable the publish notification e-mail when using the Publishing Wizard. This notification is sent and the chart is not published in the event of a:

- Broken hierarchy (orphans)

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- License violation (publishing continues normally)
- Recursive reporting relationship

Note: This email notification does not cover all possible situations that can affect publication of a chart. Always check that your chart has published successfully.

This notification is sent only if OrgPublisher is not being run interactively.

1. Select the **Enable Publish Notification Email** check box. The fields in the dialog are enabled for entry.
2. Type (or scroll to select) the e-mail address to which the notification should be sent in the **Addresses** field.
3. Type the e-mail address from which the notification should be sent in the **From Address** field.
4. Type the name of your company's **Mail Server**.

   (The **Port** field defaults but can be overridden *only on the rare occurrence* that it is not the standard port.)
5. If applicable, click **Send Test Email** to verify that the e-mail addresses you entered are correct.
6. Click **Next** and continue with the publishing procedure.

Note: When you select this option, publishing will stop when a data error is detected. If you do not want to stop publishing in the event of an error, a registry setting must be changed. Contact the Support Team for assistance.

Enabling Save As in the Published Chart

The **Save As** function can be enabled while using the Publishing Wizard.

1. Open the *Publishing Wizard*, select **Advanced Mode**, and progress to the dialog labelled *Select the toolbars and buttons you want enabled*.

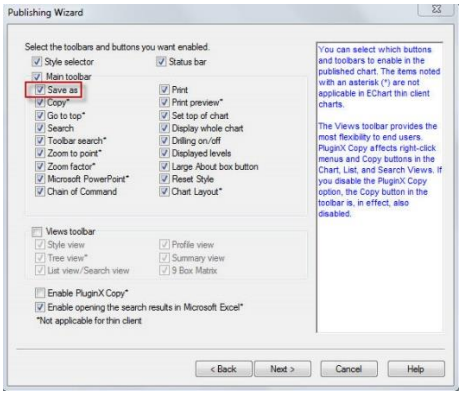

Publishing Wizard
Select the toolbars and buttons you want enabled.
Style selector
Status bar
Main toolbar
Save as
Copy*
Go to top*
Search
Toolbar search*
Zoom to point*
Zoom factor*
Microsoft PowerPoint*
Chain of Command
Print
Print preview*
Set top of chart
Display whole chart
Drilling on/off
Displayed levels
Large About box button
Reset Style
Chart Layout*
Views toolbar
Style view
Tree view*
List view/Search view
Profile view
Summary view
9 Box Matrix
Enable PluginX Copy*
Enable opening the search results in Microsoft Excel*
*Not applicable for thin client
You can select which buttons and toolbars to enable in the published chart. The items noted with an asterisk (*) are not applicable in EChart thin client charts.
The Views toolbar provides the most flexibility to end users. PluginX Copy affects right-click menus and Copy buttons in the Chart, List, and Search Views. If you disable the PluginX Copy option, the Copy button in the toolbar is, in effect, also disabled.
< Back
Next >
Cancel
Help

Figure 138.

2. Select the **Save As** check box to enable this option.

Note: The Views toolbar must be turned OFF for the Save As option to work.

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3. Click **Next** and complete the rest of the *Publishing Wizard* definitions.

Enabling Send to PDF in a Published EChart

You can now enable end users to send an EChart rich client chart to PDF by allowing that toolbar button during the publishing process.

1. Follow the Publishing in EChart Rich Client Format procedure.
2. When you reach the dialog to enable or disable toolbars and buttons, retain the default with the **Send To PDF** check box selected.

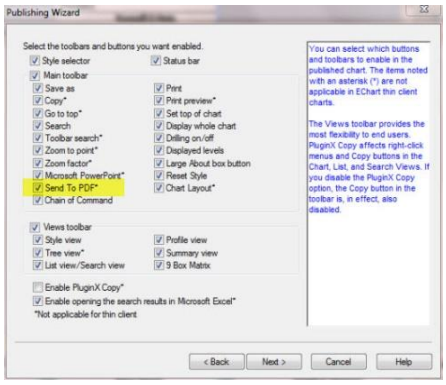

Publishing Wizard
Select the toolbars and buttons you want enabled.
Style selector
Status bar
Main toolbar
Save as
Copy*
Go to top*
Search
Toolbar search*
Zoom to point*
Zoom factor*
Microsoft PowerPoint*
Send To PDF*
Chain of Command
Print
Print preview*
Set top of chart
Display whole chart
Drilling on/off
Displayed levels
Large About box button
Reset Style
Chart Layout*
Views toolbar
Style view
Tree view*
List view/Search view
Profile view
Summary view
9 Box Matrix
Enable PluginX Copy*
Enable opening the search results in Microsoft Excel*
*Not applicable for thin client
You can select which buttons and toolbars to enable in the published chart. The items noted with an asterisk (*) are not applicable in EChart thin client charts.
The Views toolbar provides the most flexibility to end users. PluginX Copy affects right-click menus and Copy buttons in the Chart, List, and Search Views. If you disable the PluginX Copy option, the Copy button in the toolbar is, in effect, also disabled.
< Back
Next >
Cancel
Help

Figure 139.

3. Clear the check box if you do not want to allow this feature.
4. Click **Next** and complete the publishing process.

   When the published EChart is opened, the Send to PDF button displays in the toolbar.

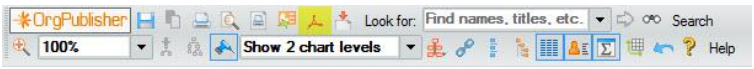


Figure 140.

5. Click the button to create a PDF of the chart.

   A dialog opens that allows you to select the **Number of OrgChart** levels to print.

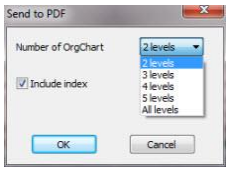


Figure 141.

   In addition, you can choose whether or not to **Include index**, a version of the List View. If you elect to include an index, the index is at the beginning of the document when you open the PDF.

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6. Click **OK** when you have made your selections. A *File Download* dialog opens.

   You can **Open** the PDF immediately or **Save** the document to a folder of your choice.

Enabling the Succession Planning Features

If you have selected this option in OrgPublisher Premier and you are the chart administrator, you can choose to enable or disable succession planning features in your chart.

1. Click **Options** from the OrgPublisher menu then **Search options** and **Customize Search dialog**. The Customize Search Dialog opens.
2. To create succession planning charts and search for succession candidates, select the **Enable succession planning features** check box. Clear the check box to disable these features.
3. Click **OK** to accept the changes and close the dialog.

End User Accessibility

The OrgPublisher PluginX chart can be accessed by JAWS® for Windows screen reading software for the blind and visually impaired. When you publish a PluginX chart, you can enable the Section 508 accessibility option in the Publishing Wizard by selecting the **Enable support for the visually impaired** check box.

An accessible chart works best if published with only the Chart View available using chart layout 1. We recommend that you not publish peripheral views, such as Profile View or List View, and that you disable the Views toolbar when using the *Publishing Wizard*. In addition, you should consider using larger fonts and basic colors.

The following functions are supported in the PluginX chart via the keyboard.

Functions	Keyboard command	Description
Find	**F key**	Opens the Enter Search text dialog. This is equivalent to an All fields search, for example, type a first or last name, or a job or box title. Press the space bar or **Enter** to begin the find, or press **TAB** to the Cancel button.
Find Next	**N key**	Performs a "find next" matching record function if a previous search occurred. Searches all fields one field at a time.
Zoom in	**Ctrl+**	Raises the zoom factor by one level.
Zoom out	**Ctrl-**	Lowers the zoom factor by one level.

Toolbar support is not currently available.

Note: JAWS hot keys, such as **F** for the next form field and **L** for the next list, are disabled. OrgPublisher PluginX accessible charts do not contain form fields, lists, links, or tables. If you use a high zoom-in level, you may notice JAWS takes a little longer to read the screen.

- End users can navigate through the chart using the **Up**, **Down**, **Left**, and **Right** arrow keys. The Drill-up/Drill-down to another level function occurs automatically.
- When a chart is opened the top box is automatically selected.
- A box must always be selected. Drilling on "white space" will not clear the current box.

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- Only one box is selectable at a time. Hierarchical "trees" are not available.
- To access a sibling of a selected top box with a drill-up button, click the up arrow first, then the left or right arrow. If the requested sibling does not exist, the original box will remain selected.
- If JAWS is running and you tab away to another application, the focus on the chart may be lost. To regain focus, press **Alt Tab** to go to another application and then press **Alt Tab** again to refocus on the chart.

Exporting Change Data in PluginX Planning Charts

When you generate change reports you can choose to export data that has changed in order to create a comma separated file reflecting changes to upload into a source HR system. You select the desired fields, and the resulting Microsoft Excel file contains three tabbed worksheets:

- Added position data records
- Removed position data records
- Edited data records (field data modified or movement in the chart)

1. In the planning chart, select **Report** from the menu then **Generate change report** from the options list. You can also click the Generate a change report button  in the toolbar.

   In the OrgPublisher application chart, select **Tools** from the menu then **Compare two charts** from the options list to open the *Compare Charts* dialog. Follow the Comparing Two Charts procedure to generate the report. The *Change Report Options* dialog opens.

2. In the **Generate Report** tab, select the report data you want to see then click the **Export Change Data** tab.

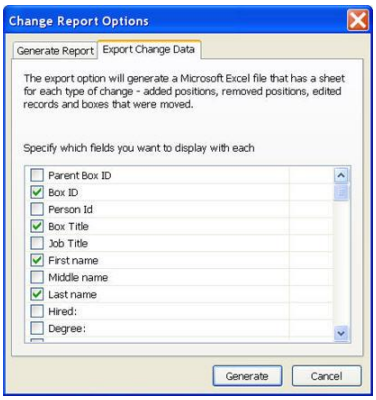

Change Report Options
Generate Report
Export Change Data
The export option will generate a Microsoft Excel file that has a sheet for each type of change - added positions, removed positions, edited records and boxes that were moved.
Specify which fields you want to display with each
Parent Box ID
Box ID
Person Id
Box Title
Job Title
First name
Middle name
Last name
Hired:
Degree:
Generate
Cancel

Figure 142.

3. Select the fields you want to see in each summary section of the report, such as position types or groups.
4. Click **Generate**. If you selected to **View report in web browser**, the browser displays a basic HTML report that summarizes the changes made in the chart using **Before** and **After** columns, as well as the **Change percent**.

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- The HTML file is saved to your local drive in the in the **Local Settings/Temporary** folder. You can also save the report by using the browser **File>Save As** option.
- If you selected **View report in Microsoft Excel**, both the report sheet and export data sheets open with the 3 tabbed sheets.

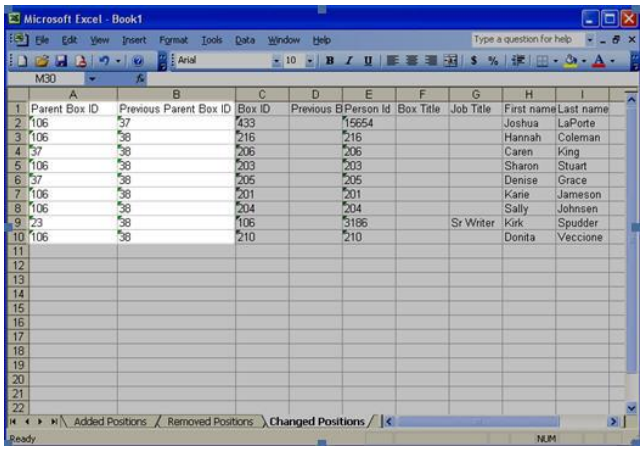


Figure 143.

See the Setting Change Report Default Options procedure for more information.

Selecting Chart Action Button Options

As the chart administrator, you can select available Action button options for each data element within the chart box in a published chart, removing any or all of the items.

1. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish  button in the toolbar. The Publishing Wizard or Publish charts dialog opens.
2. Step through the wizard dialogs and select the options you want included in this publishing definition.
3. When you reach the dialog for the context menu, click a menu item to turn it off or on. The default to all options are enabled.

   A green check indicates an option is enabled, a red X that the option is disabled.



Figure 144.

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4. Click **Next** to complete the wizard to publish your chart.

   Planning chart options differ slightly but the procedure is the same.

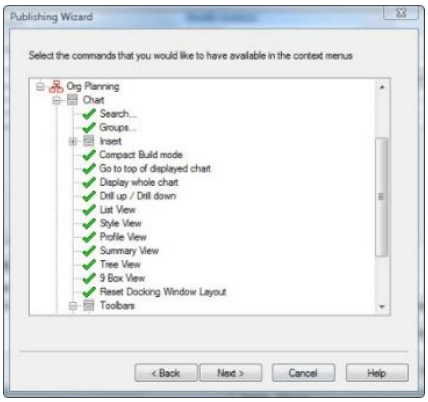


Figure 145.

Overwriting the Existing HTML and JS Files

This Publishing Wizard dialog requires that you indicate your **Publish to location** as well as allows you to overwrite an existing HTML or JS files when publishing your chart.

The **Overwrite existing HTML and JS files** check box is turned off by default. You do NOT want to overwrite your HTML or JS files if you have customized them, for example to display special web elements, or you will lose your modifications. Review technical documentation on the Customer Care Center on using an Alternate CAB File location.

However, when you first use a new version of OrgPublisher, it is advisable to create new HTML and JS files and then make your modifications to the new file.

Publishing a Portion of a Chart

1. Open the chart you want to publish.
2. Place the mouse pointer on the box you want to be the top of the chart and click to select it and all the boxes below it.
3. Select **File** from the Main menu then **Publish** from the pull-down menu. You can also click the Publish button 

in the toolbar. The Publishing Wizard or Publish charts dialog opens.
4. Select **Advanced Mode**, and step through the wizard dialogs, selecting the options you want included in this publishing definition.
5. Be sure to select the option to **Exclude positions above** if you do not want to publish the higher levels of the org chart.
6. Select a publishing option and click **Finish** to publish your chart.

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Selecting a Color Scheme for the Published Chart

This option is disabled if you are not running in at least 16 bit color. The Publishing Wizard color scheme option affects the published chart only.

1. Select the **Use a predefined color scheme** radio button if you want to use an existing color scheme.
2. Click the down-arrow and select one of the schemes from the options list. The color scheme displays in the **Preview** pane of the dialog.

   If the scheme is what you want, click **Next**. If the scheme is not what you want, select a different predefined scheme or select a custom color scheme.
3. Select the **Use a custom color scheme** radio button if you want to choose the colors for your published chart.
4. Click **Define custom color scheme**. The *Select Color Scheme* dialog opens.
5. Select the color for each gradient by clicking the down-arrow to open the color grid. Fields in the *Select Color Scheme* dialog include, background and gradient intensity, as well as a Style bar color option.
6. Select **Other** to define your custom color using the Microsoft® Windows *Color* dialog. Select the color by clicking in the color areas and using the intensity slide. Click **Add to Custom Colors**. Click **OK**.
7. You can also **Copy scheme to the clipboard** if you want to propagate the same color scheme to another chart. The code for the color scheme is copied to the clipboard which can be pasted into OrgPublisher.
8. Click **Paste scheme to the clipboard** if you want to paste the code previously copied to the clipboard into another OrgPublisher chart.
9. Click **OK** to close the dialog and return to the Publishing Wizard.

Selecting Publishing Options for the Tree View and List View

You can set display options for both the Tree View and List View from the **Options** menu. These options are only available for charts that are published with a PluginX format.

Note: The Tree View is not available in a published thin client EChart.

1. Select **Options** from the Main menu.
2. Click **Tree View options** then, from the options list, select or clear display options from a drop-down list:

Field	Description
Outline	Select this option to show box titles only.
Full	Select this option to show box titles, custom fields, and people.
Expand	Select this option to list all chart information for all levels shown.
Collapse	Select this option to show only box titles of the top two levels shown.
Show icons	Select this option to display chart icons.

3. Click **List View options** then select or clear display options.

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Field	Description
Show Displayed Positions	Select this check box to display a list of positions currently shown in the chart. Leave unchecked to display all positions.
Show List View bar in Search View	Select this option to show the *List View* option when the *Search View* is opened. Clear this option if you want to work with the *Search View* only. When you select this option and then open a style that was saved with the List View open, the bar will not be seen, but the list view information can be seen until you click on the Search View bar.

The views reflect your choices.

Sending to FTP Server

If you selected **Send to web server (FTP)** in the Publishing Wizard, the *FTP Server* dialog opens.

1. Type the required information to publish the chart to your intranet.
   - **Enter the user name** - Type your system user name or ID.
   - **Enter the password** - Type your password, if any, to transfer files to your web server.
   - **Confirm password** - Retype the password.
   - **Address (FTP URL or server name)** - You must type the correct IP address or server name before you can click **Browse Site**.
2. Once you enter the server name, the dialog displays a directory tree. Navigate to the directory you want and click on it. The **Parent Dir** button enables you to move up to the parent directory, if necessary.
3. Double-click on the correct file. The complete URL address displays in the **Path** field.
4. If applicable, select the **Establish the network connection using SSL (FTPS)** check box. Click **Next**, and continue with the wizard.

Setting Change Report Default Options

You can choose to **Enable Organizational Planning** or **Enable Succession Planning** in the Publishing Wizard, as well as select the default options for the planning chart change report.

1. Follow the *Publishing Wizard* until you reach the dialog concerning the planning chart revision history.
2. Click **Set default options for change report**. You can access the change report from the planning chart **Report/Generate change report** menu option. The *Change Report Options* dialog opens.
3. In the **Generate Report** tab, the **Generate summary** section enables you to choose the areas to summarize in the report.

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Check box options include:

Summary	Description
Create summary section	
Show position type summaries	Select this check box to display a summary of changes made to each position type in your planning chart.
Show group summaries	Select this check box to display a summary of changes made to each group in your planning chart.
Show differences in summary fields	Select this check box if you want to display changes made to each summary field in the OrgPublisher Premier planning chart.
Show differences for every manager	Select this check box if you want to display changes made to each summary field for each manager in the OrgPublisher Premier planning chart.
Show summary section for each manager	Select this check box if you want to show the detail for added or removed reporting relationships for each manager in the planning chart.
Specify how you want to show people's names in	Click the drown-arrow to select box title, job title, or customize.

4. You can customize the display of names by selecting the **Specify how you want to show people's names in the** check box.
   - If you select **Custom**, the *Custom Name Format* dialog opens and you can build the desired format.
   - By default the **Box title** and **Name** are loaded into the Custom name format: **box**. To remove these, select the text in the list and press the **Delete** key on your keyboard.
   - Scroll through the list to locate the first field you want to display.
   - Double-click on the field to place it in the **Custom name** format field: box. You can also type the field information between the **$** character.
   - To add a second field, scroll to locate and then double click on the field. A hyphen (-) is added to separate the fields of data.
   - Sample output displays in the **Example of this format** section.
   - Click **OK** to close the *Custom Name Format* dialog.
5. In the **Where to view the report** section, you can select the **View report in web browser** or **View report in Microsoft Excel** radio button. Click **OK** to accept your selections.
6. Follow the Exporting Change Data procedure to send the report to a spreadsheet.
7. Click **Next**, and continue the publishing procedure.

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Using a Virtual Directory

When you publish ECharts, cross browser Silverlight charts, real-time charts, or through Web Administration, whether to a rich or thin client, you publish to the physical directory but the reference to the chart (or web page) using HTTP must reference the virtual directory, if your web server uses one. If not, use **HTTP://mychart.htm** in the URL field in the *Publishing Wizard*.

Verify that the chart is published to a virtual directory with execute permissions. If you are not sure of the structure of your web server, please contact your Web administrator.

Using the Publish Charts Dialog

The *Publish charts* dialog is enabled after you have published a chart or created a publishing definition. You can also create new definitions and schedules, or update or delete existing definitions and schedules. From this dialog, you can publish one or all of your definitions and preview the chart before you actually publish it.

Note: Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration **SourceCharts** folder.

- Log on the server as an administrator or power user.
- Open the desktop OrgPublisher application. (If default install is used, it would be in **c:/program files/orgpubx**).
- Open the chart (found in the **SourceCharts** folder).
- Schedule the publishing definition in OrgPublisher using the Schedules tab.

Also, when you are publishing to ECharts, you must manually schedule the BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

The *Publish charts* dialog contains three tabs.

Publishing Definitions tab

The Publishing Definitions tab of the *Publish charts* dialog provides the same elements as the Publishing Wizard and is available as soon as you have created a definition or published a chart.

Buttons enable you to create **New**, and **Update** or **Delete** existing publishing definitions. Buttons are also available to, **Publish** a chart definition or **Publish All** definitions. You can also **Browse** to the publishing location you want to use.

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Fields in the **Publishing Definitions** tab are:

Field	Definition
Name	The name you set up for the chart publishing definition.
Start at	The box title chosen to be the "top of chart" for this published chart.
Style	The style selected for the published chart.
How to publish	The publishing format selected, such as PluginX.
FTP to Web server	If the check box is selected, indicates that the published definition is sent to a web server via FTP.
Date published	The date the chart was last published with this definition.

Schedules tab

The **Schedules** tab of the *Publish charts* dialog provides a list of your publishing schedules and the last time the publishing schedule ran. The **Schedules** tab displays information about the schedules for your publishing definitions. Buttons enable you to create **New** and **Delete** or **Update** existing schedules.

Always verify that your chart has published as scheduled by checking the **Last run** date and time or the **Status** information on the **Schedule Status** tab.

Fields in the **Schedules** tab are:

Field	Definition
Name	The name of the publishing schedule.
Publishing Definition	The name given to describe the publishing definition.
Schedule	The date and time the definition is scheduled to run.
Last run	The date and time the definition was last published.

Schedule Status tab

The **Schedule Status** tab of the *Publish charts* dialog provides a list of your publishing definitions and the status of each publishing run. The **View log** button enables you to open your current scheduling log in Microsoft Notepad to review it. Always verify that your chart has published as scheduled by checking the **Status** date and time.

Fields in the **Schedule Status** tab are:

Field	Definition
Publishing Schedule	The name describing the publishing schedule.
Status	This field describes the current status of the publishing schedule. If the chart has not yet been published, the status reads "The task has not yet run." Once a chart is published, the status reads "Successful Operation." If a problem occurs during the publishing process, you may see "Access denied" or "Login failure."

Updating or Deleting a Publishing Schedule

1. Select **File** from the Main menu then **Publish** from the pull-down menu. The *Publish charts* dialog displays at the **Publishing Definitions** tab.

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2. Click on the **Schedules** tab.
3. Click **Update** to modify a schedule and continue with Step 4. Click **Delete** to permanently remove a schedule. A message confirms that you want to delete the selected schedule. Click **Yes** and proceed to step 9.
4. Select or type the schedule name in the **Name** field or accept the default name displayed. The schedule name can be the same name as the publishing definition, if you want. Click **Next**.
5. Select the publishing definition you want to update, or you can choose **All definitions**. You should have one publishing schedule per chart, but you can create multiple schedules. Click **Next**.
6. Select a radio button for your publishing schedule. Click **Next**.
7. If you selected One time only, the *Schedule Once* dialog asks you to select a time of day and a date to automatically publish your chart.
8. If you selected Daily, the *Daily Schedule* dialog asks you to select a day to automatically publish your chart. For example, if you want your chart to publish **Every weekday**, you select that radio button. If you want your chart to publish every other day, you select **2** in the **Every** field. Then you set the time and actual date to begin automatically publishing your chart.
9. If you selected Weekly, the *Weekly Schedule* dialog asks you to select a weekly frequency in the **Every** field, such as **1** for every week, or **2** for every two weeks. Then you must enter the time and the day of the week to automatically publish your chart, such as **Sunday**. Your chart can be published on more than one day of the week.
10. If you selected Monthly, the *Monthly Schedule* dialog asks you to select a day, such as **Day 1**, or the **First Monday** of the month to automatically publish your chart. Then you select the time and the specific months that you want your chart published.

    Click **Next**.
11. If you are using Microsoft Windows 2000, the *User ID* dialog prompts you to type a valid user name and password in order to automatically publish your chart. You must be an authorized user of Windows® 2000, Windows® XP, or Windows® Vista™ to publish your charts on these operating systems. Click **Next**.
12. The *Scheduling* dialog displays a recap of your publishing selections. If the information is correct, click **Finish**. If you need to modify information, click **Back** until you reach the appropriate dialog and repeat steps above to complete your scheduling.

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Modify Charts

You can take several actions to modify and organize your chart data.

Note: Although this section provides information on manually editing a chart, remember that is you want the changes to remain permanent, you must apply the changes to your HR database. When your HR data is refreshed and you open your chart, your manual changes are overwritten.

Topics Pertaining to this Section	
Adding Subheadings to the Hover Profile	Moving Boxes
Adding Subheadings to the Profile View	Moving Indirect Reports
Changing a Chart Title	Moving Jobs
Changing a Job or Box Title	Moving Open Positions
Changing a Name	Moving People
Changing from an Open Position	Reordering Field Sequence in Profile View
Changing the Open Position Label	Selecting Drilling Options
Copying a Hyperlink to a Person	Showing or Hiding Chart Components
Copying Job Titles	Showing or Hiding Actual Head Count
Copying the List View	Showing or Hiding Fields in the Profile View
Copying the Summary View	Showing or Hiding Planned Head Count
Deleting Subheadings in the Hover Profile	Showing or Hiding the Head Count Label
Deleting Subheadings in the Profile View	Showing or Hiding the List Bar in the Search View
Displaying a Direct Report Count	Showing or Hiding the Style Bar
Editing an Embedded Org Chart	Sorting Boxes
Editing Subheadings in the Hover Profile	Sorting the 9 Box Matrix
Editing Subheadings in the Profile View	Updating Your Chart
Embedding an Org Chart in a Document	Refreshing Chart Data
Enabling the Hover Profile	Undoing Changes
Going to the Top of the Chart	Using Click and Drag Scrolling
Moving Boxes with Cut and Paste	

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Adding Subheadings to the Hover Profile

You can add subheadings to the Hover Profile using the *Show/Hide Fields* dialog. Subheadings can help you organize data fields for better viewing. Subheadings are affected by security attached to fields beneath the headings.

> **Note:** When all fields under a heading are secured so that a particular end user cannot view them, the subheading above the fields is also hidden for that end user.
>
> The *Profile View* is **not the same** as the *Hover Profile*. Modifications made in one place are not reflected in the other.

1. Right-click on a field name in the Hover Profile, and select the **Configure Profile View** option. The *Configure Hover Profile* dialog opens.

   The dialog contains **Person**, **Job**, and **Box** tabs, as well as Add heading, Edit heading, and Delete heading buttons. You can also resize the Hover Profile in the Popup View Size section.

2. Choose the box component for which you want to assign a subheading. If your fields are in the order you want to display them, you can highlight the first field you want to display below the subheading then click **Add heading**. The *Heading Caption* dialog opens.

3. Type the name of the heading you want to use and click **OK**. The subheading appears at the point you highlight in the list or, if you don't highlight a field, it appears at the bottom of the list in the *Show/Hide Fields* dialog. The corresponding check box is automatically selected for display in the *Hover Profile*.

4. Use the **Move Up** or **Move Down** buttons to arrange the subheading and the fields to display under it.

5. Click **OK** to accept changes and close the dialog.

Editing Subheadings in the Hover Profile

1. Right-click on a field name in the *Hover Profile*, and select the **Configure Profile View** option. The *Configure Hover Profile* dialog opens.

2. Select the subheading you want to modify.

3. Click **Edit heading**. The *Heading Caption* dialog opens.

4. Modify the subheading name as necessary and click **OK**. The change is saved and the dialog closes. The *Hover Profile* reflects the name change.

Deleting Subheadings in the Hover Profile

> **Note:** There is no warning prior to deleting the subheading.

1. Right-click on a field name in the *Hover Profile*, and select the **Configure Profile View** option. The *Configure Hover Profile* dialog opens.

2. Select the subheading you want to delete.

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3. Click **Delete heading**. The subheading is immediately deleted. It no longer displays in the dialog or the *Hover Profile*. All check boxes for the associated components are cleared, and the components do not display in the *Hover Profile*.

Adding Subheadings to the Profile View

You can add subheadings to the Profile View using the Configure Profile View dialog. Subheadings can help you organize data fields for better viewing. Subheadings are affected by security settings attached to fields beneath the headings.

> **Note:** When all fields under a heading are secured so that a particular end user can not view them, the subheading above the fields is also hidden for that end user.

The Profile View is **not the same** as the Hover Profile. Modifications made in one place are not reflected in the other.

1. Right-click on a field name in the *Profile View*, and select the **Configure Profile View** option. The *Configure Profile View* dialog opens.

   The dialog contains **Person**, **Job**, and **Box** tabs, as well as **Add heading**, **Edit heading**, and **Delete heading** buttons.

2. You can modify each tab to work as a Person Profile View, Job Profile View, and Box Profile View. Select the tab in which you want to add subheadings.
3. Choose the component for which you want to assign a subheading. If your fields are in the order you want to display them, you can highlight the first field you want to display below the subheading then click **Add heading**. The *Heading Caption* dialog opens.
4. Type the name of the heading you want to use and click **OK**. The subheading appears at the point you highlighted in the list or, if you didn't highlight a field, at the bottom of the list in the *Show/Hide Fields* dialog. The corresponding check box is automatically selected for display in the Profile View.
5. Use the **Move Up** or **Move Down** buttons to arrange the subheading and the fields to display under it.
6. Click **OK** to accept changes and close the dialog.

   The *Profile View* displays the new subheading, indented one space, with corresponding fields indented two spaces, and listed beneath the subheading.

Editing Subheadings in the Profile View

1. Right-click on a field name in the Profile View, and select the **Configure Profile View** option. The *Configure Profile View* dialog opens.
2. Select the profile tab you want to modify, **Person**, **Job**, or **Box**, and select the subheading you want to modify.
3. Click **Edit heading**. The *Heading Caption* dialog opens.
4. Modify the subheading name as necessary and click **OK**. The change is saved and the dialog closes. The *Profile View* reflects the name change.

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Deleting Subheadings in the Profile View

Note: There is no warning prior to deleting the subheading.

1. Right-click on a field name in the *Profile View*, and select the **Configure Profile View** option. The *Configure Profile View* dialog opens.
2. Select the profile tab you want to modify, **Person**, **Job**, or **Box**, and select the subheading you want to delete.
3. Click **Delete heading**. The subheading is immediately deleted from the *Configure Profile View* dialog and the *Profile View*. The associated field check boxes are cleared, and no longer display in the *Profile View*.

Changing a Chart Title

You can change the title of your organizational chart at any time. You can also use the **Chart** tab of the *Format* dialog or select **Format** from the Main menu and **Title** from the options list.

1. Click the chart title text to select it in the Chart View. A red box outlines the title.
2. Click the title again to highlight the text.
3. Type the new chart title and click somewhere in the chart or press **Enter**. The new chart title displays.

Changing a Job or Box Title

You can change job and box titles in your chart at any time.

1. Double-click on the box title or job title in the *Chart View*. The *Rename Box/Job Title* dialog opens.
2. Type the new title over the old one. If you are changing the box title and there are multiple titles existing in the chart, you can also select a title from a drop-down list.
3. Click **OK**. The new title displays in the chart box.

Changing a Name

In OrgPublisher, you can change a person's name by using the *Update Person* dialog.

1. Double-click the person's name in the *Chart View*, or if a name hasn't been entered, the default text, such as "Manager name." The *Update Person* dialog opens.
2. Type the new name in the **First name**, **Second**, or **Last name** fields.
3. You can also update the **ID** field in this dialog, if required.
4. Click **OK**. The name displays in the chart box.

   In addition, the **ID** field contains the unique ID information necessary to enable the use of multi-relationship icons and EChart security.

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Changing from an Open Position

You can change an open position to the appropriate position type at any time.

1. Verify you are in Build Mode then double-click the open position in the Chart View. The *Update Person* dialog opens.
2. Type the name of the person who filled this position in the **First name**, **Second**, or **Last name** fields.
3. You can also update the **ID** field in this dialog, if required.
4. Select the **Position type** from the list if the chart box does not designate one already.
5. Click **OK**. The open position text in the chart box is replaced by the person's name. If the chart box is an assistant or partner box, the position type changes automatically when you enter a person's name.

Changing the Open Position Label

1. Select **Edit** from the Main menu then **Define** from the pull-down menu. The *Define* dialog opens to the **Positions** tab.
2. Select the record line for **Open position** and, in the **Position type** field, type the label name you want to use.
3. Click **OK**. All open positions in your chart will display the new text.

Copying a Hyperlink to a Person

With OrgPublisher you can copy the link to a person in the published chart if you publish to and access the published chart from a server.

> **Note:** If there are multiple people in a box, OrgPublisher opens the box and selects the first person listed.

1. Open the published chart and right-click on a person's name, the job, or the box title. A list of menu options appears.
2. Select the **Copy hyperlink to person** or **Copy hyperlink to box** option.
3. Open an application that can recognize and use hyperlinks, such as an e-mail client, and paste the link into the application. The hyperlink text appears.

   For instance, you can copy a link to a person in a chart, paste the link into an e-mail message, and send the e-mail to a supervisor who should review information in this person's chart box. The supervisor clicks on the link and the chart opens at that person's location in the chart.

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Note: If the link is pasted into Microsoft Word or an e-mail, and the published chart is accessed through the file system, such as **C:/Program Files (x86)/OrgPub10/Web/OPDev.htm,** the target box is not located. The link will, instead, open at the top of the chart.

Copying a link feature works as designed when the published chart is accessed through HTTP, even if pasted into a Microsoft Word document or an e-mail.

Copying Job Titles

You can copy job titles and paste them to other boxes in the chart.

1. Press and hold the **Ctrl** key. Press and hold the left mouse button over the job to copy.
2. Drag the pointer to the new box or job title. Release the mouse button and then the **Ctrl** key. The job title is inserted below the selected location.

   OrgPublisher automatically inserts an open position below the job title.

Copying the List View

You can copy information from the List View and paste it into other Microsoft® Windows® applications.

Note: When working with a published EChart, the Copy whole list option is not available because ECharts are, typically, very large charts. You can, however, use the Search feature and select the **Everyone** group, then copy the list to the clipboard.

To copy a record

1. Highlight the record in the *List View* and right-click.
2. Select **Copy selection** from the options list.
3. Click the Copy button  in the toolbar.
4. Open the Windows application and click the Paste button  . The selection appears in the new application.

To copy the entire list

1. Right-click in the *List View*.
2. Select **Copy whole list** from the options list.
3. Open the Windows application and click the Paste button  . The selection displays in the new application.

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Copying the Summary View

You can copy information from the Summary View to other Microsoft® Windows® applications.

Note: The Summary view is not available in a published real-time chart.

1. Right-click in the *Summary View*.
2. Select **Copy Summary** from the options list.
3. Click the Copy  button in the toolbar.
4. Open the Windows application and click the Paste  button. The summary information displays in the new application.

Displaying a Direct Report Count

With the levels and span of control feature in OrgPublisher Premier, you can show the direct report count for each manager, director, vice president, and president by creating a custom field and assigning the **Direct Count** custom field type. When you make a change to a summary field, OrgPublisher recalculates the field from the top of the chart through the bottom level.

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. You can also use the Custom fields button  in the toolbar. The Custom Field Properties dialog opens.
2. Position the cursor where you want to add the new custom field, either somewhere within existing fields, or at the end. Click **Insert**. If you are inserting a field within the list of existing fields, a message dialog verifies that this is what you want to do.
3. Enter the field name in the **Field label** column.
4. Press the **TAB** key to move to the **Type** column. Click the down-arrow and select **Direct Count**.
5. Press the **TAB** key to move to the **Population** column and select the position types, total head count, or planned head count to be included in your calculation.
6. Press the **TAB** key to move to the **Assigned To** column. The *Update Assigned Custom Fields* dialog opens. Select the position types you want to assign the custom field to, such as Manager, Director, Vice president, or President.
7. In the same dialog, choose where you want the field to display, Box title, Job title, or Name. Click **OK** to accept your changes and close the text box. (If you click on the position type name rather than the plus sign (+), the Name component is automatically selected.) Click **OK** to close the dialog.

   The **Sample** field displays the contents of the first custom field for this **Type**.

   The **Seq** field displays the OrgPublisher Input File record sequence for that custom field.

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8. Click **Apply** then **Close**. The Direct Count field appears in the chart.

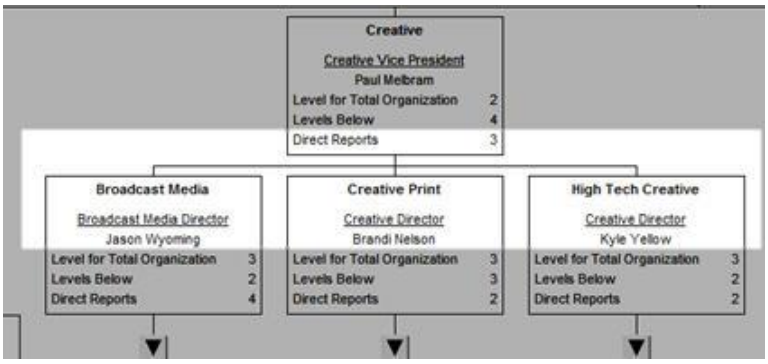


Figure 146.

Editing an Embedded Org Chart

You can edit linked or embedded charts from within the target application.

1. Double-click in the object to edit. The OrgPublisher toolbar and editing area appear.
2. Make changes to the object using the OrgPublisher editing tools.
3. If the chart is embedded, click outside the chart. The application's toolbar refreshes. **Save** the changes.

   If the chart is linked, select **File** from the OrgPublisher Main menu then **Save** from the pull-down menu. Exit to return to the original application.

Embedding an Org Chart in a Document

You can embed a chart in another COM automation-compliant document. You can also use Previewing a Wall Style Chart to copy a modified chart.

1. In OrgPublisher, save the chart to be embedded.
2. To select a box and all its reports, for instance the top box in the chart hierarchy, click on the **Box title**.
3. Select **Edit** from the Main menu then **Copy** from the pull-down menu.
4. Open the target application and document, such as Microsoft® Word.
5. In the target document, select the point to insert the OrgPublisher chart.
6. In the target application, select **Edit** from the menu bar then, in the target application, select **Paste** from the pull-down menu. A copy of the chart displays in the document.

Enabling the Hover Profile

1. Select **Format** from the menu and **Chart** from the options list. The *Format* dialog opens at the **Chart** tab.
2. Scroll down to the **Show Hover Profile** field and select the corresponding check box.

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3. Type the time in milliseconds in the **Hover Profile Delay (ms)** field that the mouse cursor must remain in the field before the Hover Profile opens. The range is **1000 milliseconds (1 second)** to **20,000 milliseconds (20 seconds)**.
4. Click **OK** to save the change and close the Format dialog.

Going to the Top of the Displayed Chart

You can return to the top of the current chart level in the Chart View after you have scrolled to a specific box or after you have performed a search.

- Select **View** from the Main menu then **Go to top of displayed chart** from the pull-down menu.
- You can also use the Go to top of displayed chart button  from in the toolbar.

  OrgPublisher displays the box at the top of the current drilling level and its reporting boxes.

Moving Boxes with Cut and Paste

When you right-click and cut a box, the box/span of control remains in the chart with diagonal lines drawn across the box.

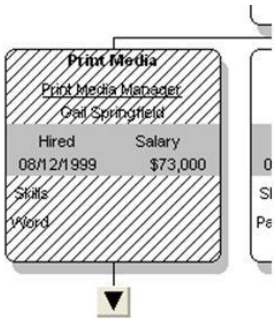


Figure 147.

The box stays in its current position until you select a box on which to paste (move) the cut box or span of control.

If you change your mind, you can right-click on the selected box or press the **Esc** key to remove the "cut" status.

Moving Boxes

You can move boxes or span of control from one location to another in your chart. See the Moving Boxes in Print Preview section of this document if you want to temporarily move boxes in order to print your chart.

1. Press and hold down the left mouse button  over the box title. The box and all reporting boxes are selected.
2. Drag the box pointer to the new top box and drop it on the top box.

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3. You can also drag and drop to rearrange boxes on a horizontal line without changing the top box. Select a box and then drag it to another location at the same level.

Moving Indirect Reports

Indirect reports, also referred to as matrix reporting, are not counted for head count purposes. If an indirect report is dropped on a **job title** or another name, the indirect report inherits the new reporting relationship. If an indirect report is dropped on a **box title**, the indirect report is moved to that box and remains an indirect report.

One box must be designated Position Type "E" for Employee. Other boxes must be designated position type "I" for Indirect Report.

1. Press and hold down the left mouse button over the indirect report you want to move.
2. Drag the cursor to the new box or person and release the mouse button. The indirect report and associated fields, including the multi-relationship icon, if used, are inserted below the selected location. Indirect report boxes are displayed with dotted lines around the box, as well as the lines to the box.

When building from data, you need multiple employee records — one for each manager (see sample of data below). The records should look like the following:

ParentBoxID	BoxID	Box Title	Record Type	ID	Last Name	First Name
Manager 1	1234	xxx	E		Smith	Carol
Manager 2	1234a	xxx	I		Smith	Carol
Manager 3	1234b	xxx	I		Smith	Carol

Moving Jobs

1. Press and hold down the left mouse button over the job you want to move.
2. Drag the cursor to the new box title or job title, and release the mouse button. The job title and associated people and custom fields are inserted below the selected location.

Moving Open Positions

1. Press and hold down the left mouse button over the open position.
2. Drag the cursor to the new box title, job title, or name, and release the mouse button. The open position and any custom fields associated with the position are inserted below the selected location.
   - When you drop an open position onto a box title, a job title is automatically created for the open position.
   - When the last open position is moved from a job title, a copy of the open position remains at the original location. The last open position must be deleted manually, because deleting the last open position also deletes the job title.

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Moving People

1. Press and hold down the left mouse button over the person's name.
2. Drag the cursor to the new box title, job title, or name, and release the mouse button. The person and any custom fields associated with the person are inserted below the selected location.
   - When you drop a person on a job title or another person, the moved person inherits the new job title.
   - When the last person is moved from a job title, OrgPublisher creates an open position under that title.

Reordering Field Sequence in Profile View

You can reorder the field sequence in Profile View.

Note: The *Profile View* is **not the same** as the Hover Profile. Modifications made in one place are not reflected in the other.

If the *Profile View* contains subheadings, you must move the subheading as well as items beneath it.

1. Right-click on a profile field.
2. Select **Configure Profile View** from the drop-down list. The *Configure Profile View* dialog opens.
3. Highlight the field you want to move and click **Move Up** or **Move Down** until the field is where you want it. Click **OK** when the field is where you want it.

Selecting Drilling Options

1. Select **View** from the Main menu then **Drill-up/Drill-down** from the pull-down menu. An arrow displays next to the option to indicate that drilling is enabled.

   You can also click on the Drill-up/Drill-down button  in the toolbar, or right-click in the chart area and choose **Drill-Up/Drill-Down** from the options list.
2. To turn off the drilling option, select **View** from the Main menu then click on the arrow next to the **Drill up/Drill down** option to clear it.

   You can also customize the look of the drill buttons.

Showing or Hiding Actual Head Count

Note: Orphan records and broken hierarchies can adversely affect summary and security functions. Unexpected results can occur that may cause head count or other totals to be incorrect.

1. Select **View** from the Main menu then **Status Bar** from the pull-down menu. The Status bar options display in an options list. Each option displays a check mark when selected.
2. Click **Head count** to show the actual head count for the displayed portion of the chart. Or, clear it to hide the actual head count.

   Shown Head count displays in the Status bar at the bottom of the window.

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Showing or Hiding Chart Components

You can show or hide specific components in your chart such as an open position, assistants, partners, custom fields, hotspots, or your logo.

Note: The Show/Hide Chart Components dialog does not apply to position types formatted using the Advanced Box Layout Editor.

1. Select **View** from the Main menu then **Show/Hide chart components** from the pull-down menu. The *Show/Hide Chart Components* dialog opens at the **Components** tab.

   You can also click on the Show/Hide Chart Components button  in the toolbar.
2. In the **Style** field, select a style from the drop-down list that you want to modify.

   In the pane below the field, a check mark next to a **Position type** means it is displayed. An **X** means the position type is hidden.
3. Click the plus sign (**+**) to expand and view the components of a position type.
4. Click on a component to display (green check mark) or hide (red X) it.
5. Select a group from the **Group displayed** drop-down list to show in the chart style.
6. Click **Apply** to update the chart and keep the dialog open for further changes, or click **OK** to update the chart and close the dialog box.

Note: In conditional formatting, the search feature and all calculations follow the conditional position type. Formatting follows the group. If you display the Summary View in a chart with conditional formatting, you should hide either the group or position type of the conditional format. If you don't, head counts display in both areas.

Showing or Hiding Fields in the Profile View

1. Right-click on a field in the Profile View.
2. Select **Configure Profile View** from the drop-down list. The *Configure Profile View* dialog opens.
3. Select the check box for the field or subheading you want to show or hide. A check indicates the field is displayed. A blank box indicates that the field is hidden.
4. You can also rearrange the position of each field, or arrange fields to display beneath a subheading, by clicking the **Move Up** and **Move Down** buttons.
5. Click **OK** to close the dialog. The *Profile View* reflects the changes.

Showing or Hiding Planned Head Count

1. Select **View** from the Main menu then **Status Bar** from the pull-down menu. A drop-down list displays the Status bar options. Each option selected for display is checked.
2. Select **Planned** to show the planned head count for the displayed portion of the chart. This option adds in the number of open positions displayed in your chart. You can click on the option again to clear it.

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3. You can display both the actual and the planned head count at the same time by selecting both options in the option list. **Planned head count** displays to the right of **Shown head count**.

Showing or Hiding the Head Count Label

You can show or hide the label, or name, of a head count field in two ways.

- When you create or modify a style, you can select the **Hide label** check box in the Head Count Wizard to hide the label in the chart. To show the label, leave the check box blank.
- Right-click on the label in the Chart View and select the Hide label for option. To show the label, right-click on the head count field and select **Show label**.

Showing or Hiding the List Bar in the Search View

The List View and Search View share the same pane in the OrgPublisher window. The default setting is now to hide the *List View* option.

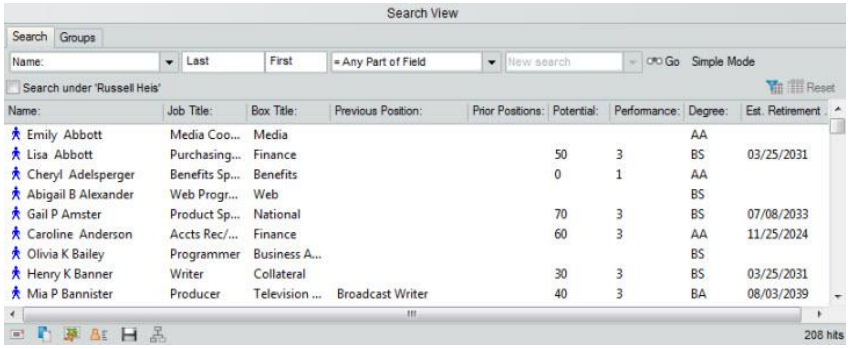


Figure 148.

1. Select **Options** from the Menu Bar.
2. Highlight **List View options** from the pull-down menu.
3. Select **Show List View bar in Search View**.

   When you open the *List View*, the **Search View** bar displays at the bottom of the pane.

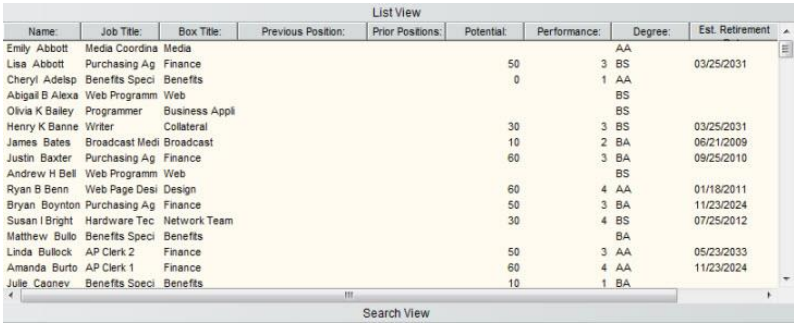


Figure 149.

4. Clear the checkbox to hide the List View bar.

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Showing or Hiding the Style Bar

You can elect to hide the Style Bar in OrgPublisher by using the **View** menu option. The default is to display the Style Bar.

- You can also select **View** from the Main menu then **Toolbars**, **Styles Toolbar**, and **Show Styles toolbar** from the options menu. A check mark indicates that the Style Bar is shown in OrgPublisher. Clear the option to hide the bar.

Sorting Boxes

In OrgPublisher you can sort by boxes in the Chart View across rows manually, by box ID, or by a selected field. (After remodeling a chart using drag and drop editing, you can select the **Sort by this field** option to sort the chart on box ID left to right.)

> **Note:** Charts saved in previous versions of OrgPublisher open with the original sequencing unaffected.
>
> If you choose to sequence by field, this sequencing overrides any previous sequencing and priority choices.

Charts built from data are always sorted left to right by box ID. The **Sort manually** option is enabled by default.

1. Select **Options** from the Main menu and **Sort options** from the pull-down list. The *Sorting Options* dialog opens.
2. Select the radio button that describes the sort option you want to use.

   Selecting the **Sort manually** option enables you to place boxes where you want them in a row, or place position types, etc. where you want them in a box.

   Selecting **Sort by Box ID** enables OrgPublisher to automatically sort boxes by the ID in file layout field 2.

   Selecting **Sort by this field** enables you to select a custom field by which to sort the boxes.
3. If you select **Sort by this field**, click the down-arrow in the adjacent field and select the field name by which you want to sort, such as **Last name** or **Box title**.
4. Click **OK** to close the *Sorting Options* dialog and apply your sort option.

Sorting the 9 Box Matrix

When you create a 9 Box Matrix, available in OrgPublisher Premier, you can choose to sort the data within the matrix boxes.

> **Note:** Records displayed in the 9 Box Matrix are associated with the level displayed in the *Chart View*.

1. Open your chart and click the 9 Box Matrix button  in the toolbar.

   The *9 Box Matrix* opens. If no matrix currently exists, the 9 Box Matrix Wizard opens automatically.

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2. If a matrix currently exists, click **Tools** in the Main menu then select **9 Box Matrix Wizard** from the options list to open the wizard.
3. Follow the wizard dialogs to select the fields, limits, and filter options, including **Provide additional customization**, until you reach the "data within each of the nine generated boxes" dialog.
4. Select the **Field** name for you want to sort by in the 9 Box Matrix.

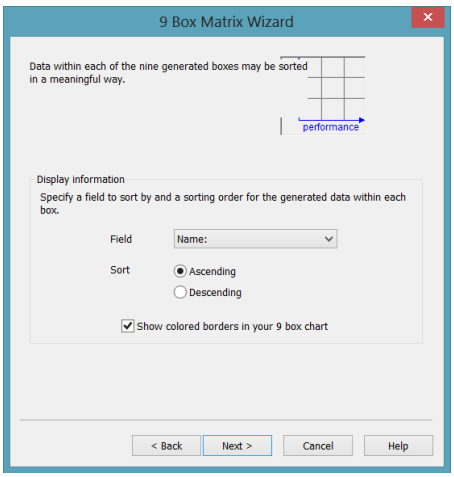

9 Box Matrix Wizard
Data within each of the nine generated boxes may be sorted in a meaningful way.
performance
Display information
Specify a field to sort by and a sorting order for the generated data within each box.
Field
Name:
Sort
Ascending
Descending
Show colored borders in your 9 box chart
< Back
Next >
Cancel
Help

Figure 150.

5. Select the **Sort** order, then **Ascending** or **Descending**. Click **Next**.
6. Complete the wizard and click **Finish** to view the matrix.

Updating Your Chart

You can update chart data after you have created your organizational chart by refreshing the chart data with changes made to the database. If your chart was created from multiple data sources, you can also manage data sources through the **Tools** menu.

Note: You can update a published real-time chart by clicking the Refresh button in the browser or by drilling through the chart.

You may want to change chart data in the OCB file to reflect personnel changes that have not yet been applied to your HR database. When you overwrite or manually update a chart that was created with a database connection, an OCB file is created.

Refreshing Chart Data

OrgPublisher updates your chart built from data every time you open that chart. You can also keep the data in your org chart up-to-date while you are working in your chart. The following steps explain how to do this manually. Detailed information about automating this process can be found in the OrgPublisher System Development Kit (OPSDK) .

1. Open the ODB file for the chart you want to update. Your database connections are automatically reestablished and your org chart is displayed.
2. Select **Data** from the Main menu then **Refresh** from the pull-down menu. Any changes made to data in your HR database are applied to the chart data.

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Undoing Changes

If you make a change in your chart, then decide that you do not want to keep the change, you may be able to reverse, or undo that change. You can undo most content-related changes, such as adding, deleting, moving, and copying information.

Formatting changes, such as changes to box style, text size, or the color of chart components cannot be reversed.

- To Undo a content change click the Undo button  in the toolbar.

Or

- Select **Edit** from the menu bar, then **Undo** from the pull-down menu.

Using Click and Drag Scrolling

When the mouse cursor sits over a blank area in the Chart View, the cursor changes to a hand icon  . Using the click and drag scrolling feature is another way to navigate through a large chart. This option is always enabled and cannot be turned off.

- Click and hold down the mouse button. The hand closes  and allows you to scroll through the chart levels by dragging or moving the mouse wheel in the direction you want the Chart View to move.

For instance, if you want to see the bottom of a chart level, you want the *Chart View* to move up. Click the hand in the background of the view and drag upwards.

OrgPublisher Scrolling

Chart scrolling is now updated with more of an iPod® scrolling feel. As you drag to move a chart, it will appear more as a "toss." As you release the mouse, the chart continues to move with a gradual slow down to its new position.

Mouse Wheel Scrolling

You can also use the mouse wheel to scroll the window up or down. Some computers may have different mouse scroll vertical settings, and users may experience different results when using this feature.

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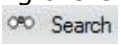
Groups and Searching

Topics Pertaining to this Section	
Adding a Group Category	Removing a Person from a Group
Adding a New Group	Saving and Charting Searching Results as a Group
Adding a Group Icon	
Adding to a Search Results List	
Auto-pinning Group or Search Results as Side-by-Side Profiles	Searching Within a Group Results List
Combining Searches	Securing Styles to a Group
Conducting a Boolean Search	Sending E-mail to a Group
Copying a Group or Search Results List	Spotlighting Search Results or Groups in the Chart View
Creating New Groups Using the Group Creation Assistant	Using the Sounds Like Feature
Deleting a Group	Using the Group Filter in Searches
Editing a Group Definition	Using the Group Editor Dialog
Exporting and Importing Groups	Using the My groups Tab in the Search View
Hiding Groups in Published Charts	Using the Smart Search Option
Opening a Selected Group in the Chart View	Using the Toolbar Search with Quick Search Results
	Viewing Search Results in Microsoft Excel

Adding a Group Category

You can add group categories to your chart in order to classify groups with a common theme, such as, for a global company, groups by country or HR items like retirements or ethnicity.

> **Note:** The category name is **not** a searchable field. The **Value**, or group name, is the searchable field.

1. Open the **Groups** tab of the *Search* dialog by clicking the Groups button  in the toolbar, or by clicking the Advanced Search button  and selecting the **Groups** tab.
2. Double-click on a group name for which you want to create a category. The Group Editor dialog opens.
3. In the optional **Category** field, type the name of the category you want to add.

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The category name appears in the **Search Field** of the record displaying the selected group criteria in the center of the dialog.

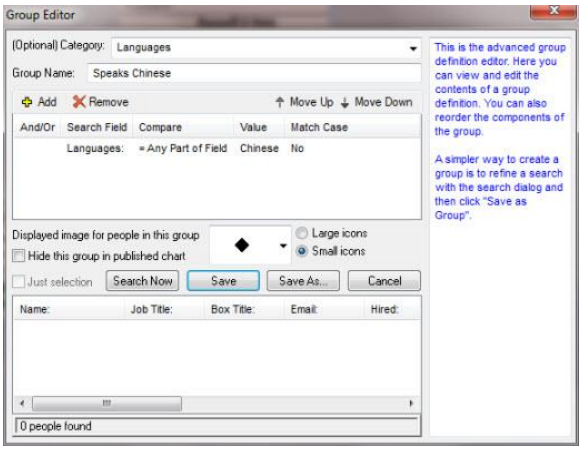


Figure 151.

4. Click **Save**. The **Groups** tab redisplays with the new category name, and the group name indented below it.

   When selected, the **Category** name is highlighted in green.

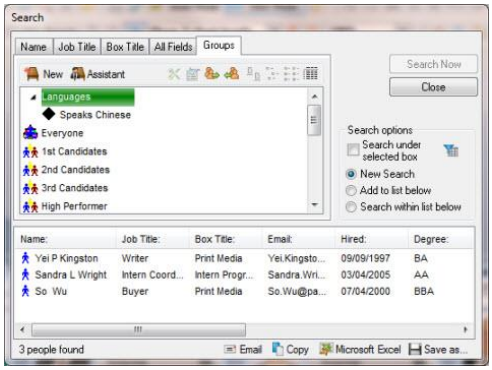


Figure 152.

When selected, the **Group** name is highlighted in blue.

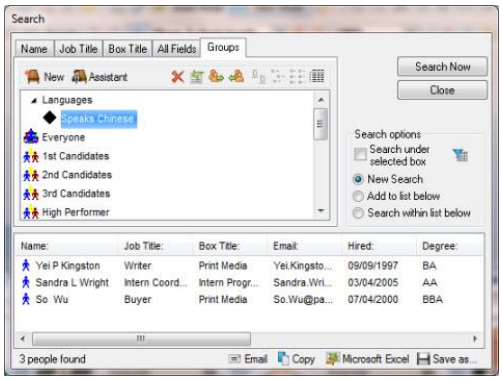


Figure 153.

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5. Repeat steps 2 - 4 to add additional categories.

   If you want to use an existing category, click the drop-down arrow in the **Category** field and select the name you want to use.



Figure 154.

The group Filter View displays the groups indented below the associated category name.

The group *Filter View* list first displays the category names in alphabetical order, then the associated group within the category name in alphabetical order, then the groups without categories in alphabetical order.



Figure 155.

Adding a New Group

You can add a person to a group directly from the *Chart View*. In addition, you can add a new group using the **Select a Group** text box.

Adding a Group by Searching

1. Conduct your search using one of the *Search* dialog tabs or by using the Search View pane in the List View.
2. When your search result is the way you want it, click Save as Group. The *Enter a group name* text box opens.
3. Type the name of the group.

   Click **OK**. The *Search* dialog or *Search View* displays the **Group** tab with the new group displayed.

   Note: Do not name groups with the same name as custom item icons. Custom legend icons and groups do not synch.

   If an end user has conducted a search in the published chart, the saved group displays in the **My groups** tab of the *Search View*. The new group displays in the PluginX Filter View only.

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4. If you are using the *Search* dialog, close it. Click on the down-arrow in the Styles bar. The *Filter View* displays your group names. Click on the name of the group you want to chart. The Chart View displays the group members within the original hierarchy.

   For instance, if you searched your chart to find all open positions and saved the group, the charted group shows the boxes containing open positions and the parent boxes those open positions report to.

Adding a Group using right-click menu

1. In the Chart View, select the name of the person you want to add to a new group.
2. Right-click on the person's name and click **Add person to group** from the options list. The *Select a Group* text box opens.
3. If you are adding the person to an existing group, use the down-arrow in the **Group** field to select the group name.

   If you are adding the person to a new group, click **New Group**. The *Enter a group name* text box opens.
4. Type the name for the group. Click **OK**. The text box closes and the new group is created and the name is added to the Filter View.
5. Click **OK** again to close the *Select a Group* dialog.

Adding a Group Icon

Add an image to display in your chart next to the names of individuals belonging to a selected group. Use standard 16x16 and 32x32 pixel icons (.ico files).

1. Click the Search 

button in the toolbar. The Search dialog opens.
2. Click the **Groups** tab and double-click on the group you want to modify. The Group Editor dialog opens.
3. Select the radio button to choose from **Small icons** or **Large icons** to display in the chart boxes.
4. Click the down-arrow in the **Displayed image for people in this group** field and select the icon you want to display from the pull-down list.
5. You can also scroll to the end of the list and click **Other**. This opens the *Select an icon file* dialog where you can browse to another icon image resource file. Valid files of type are .ico, .dll, .exe, .ocx.
6. If applicable, you can select the check box to **Hide this group in published chart**. For additional information, see the Hiding Groups procedure in this document.
7. Click **Save**. The dialog closes. Click **Close** to return to the *Chart View*.

   The selected group icon displays in the lower-left corner of the group member's box. You can change where you want to display the icon by selecting **Format** from the menu and **Boxes** from the options list. In the **Show group icons** field, select **Left**, **Center**, or **Right**.

   Click on the group icon to open the Group Editor dialog to modify or delete (select **(None)** from the pull-down list) the displayed icon.

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Attaching or Removing Group Icons in Styles

You can choose not to display a group icon in selected styles in your chart by using the *Attach Groups to Styles* dialog.

1. Select **Options** in the OrgPublisher Main menu, then **Group display options**.

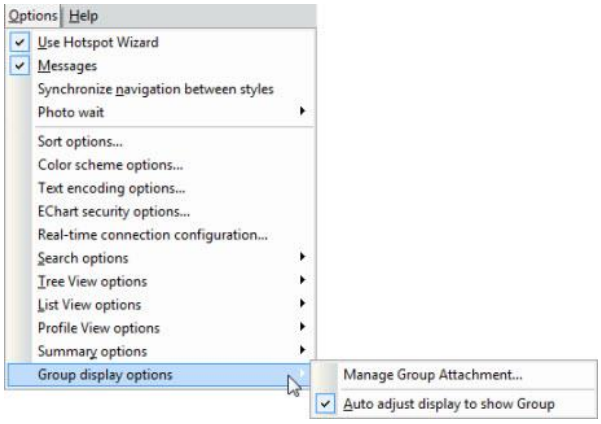


Figure 156.

2. Click **Manage Group Attachment**.

   The *Attach Groups to Styles* dialog opens.

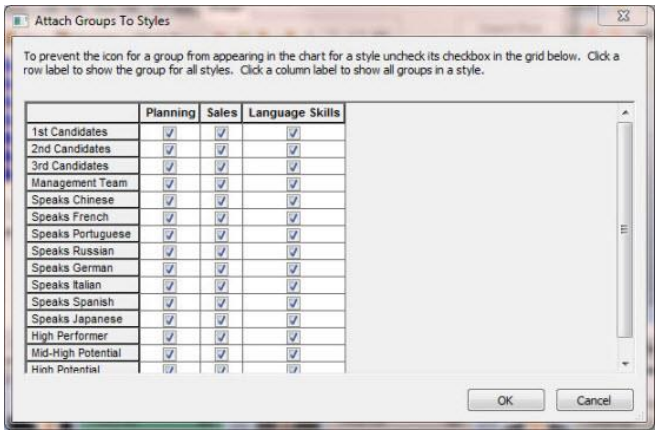


Figure 157.

   The default is to attach all group icons to all styles in the chart.

3. Find the style you want to modify, and make your changes. Clear the check box for each named group you do not want to visually display in the chart.

   When you have finished modifying the styles to not display a group icon, click **OK**.

   When you return to the chart and select a modified style, icons do not display in chart boxes for the groups you modified.

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Copying a Group List

You can copy the group or search results list from the *Search View*.

You can also use the View Search Results in Microsoft Excel procedure.

1. In the Search View, select either the **Groups** or **My groups** tab.
2. Double-click on the group you want to copy.
3. Click the Copy the list to clipboard button  .
4. Open the application in which you want to place the list and paste it.

   You can also move the cursor to the search results pane and right-click on a name. From the options list, select **Copy whole list** or **Copy selection** to copy a single record.

> **Note:** If you are working with a very large chart, because of its size, the **Copy whole list** option is not available. You can, however, use the Search feature and select the **Everyone** group, then copy the list to the clipboard.

Creating New Groups Using the Group Creation Assistant

The *Group Creation Assistant* provides a series of dialogs which ask the questions needed to create multiple groups at the same time, although you can use the assistant to create a single group.

1. Click Search  in the Navigation bar. The *Search* dialog opens.
2. Select the **Groups** tab.
3. In the **Groups** tab, click the Group Creation Assistant button  .

   The *Group Creation Assistant Step 1* dialog opens.
4. Click the drop-down arrow in the **Select the field that contains the values**… field, and select the field you want to search on.

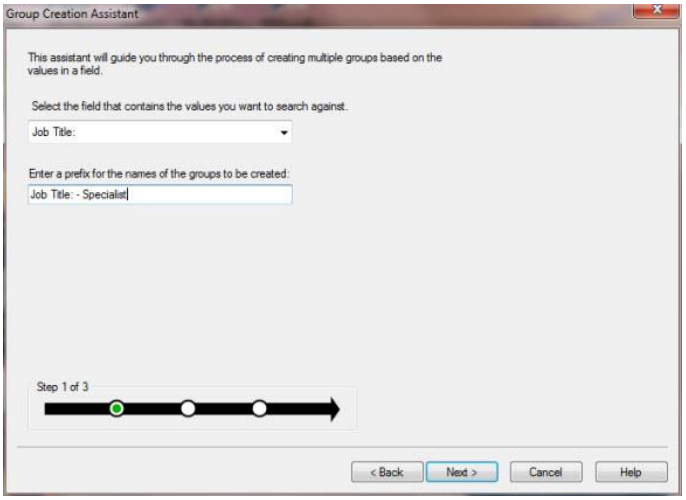

Group Creation Assistant
This assistant will guide you through the process of creating multiple groups based on the values in a field.
Select the field that contains the values you want to search against.
Job Title:
Enter a prefix for the names of the groups to be created:
Job Title: - Specialist
Step 1 of 3
< Back
Next >
Cancel
Help

Figure 158.

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5. Type a prefix or name for the group in the **Enter a prefix for** field. Click **Next**.

   The *Group Creation Assistant Step 2* dialog opens.

   The left pane contains the values available for grouping the data in the field you selected.

   These values are sorted first by "hit" count (the highest number of records to match the criteria), then alphabetically.

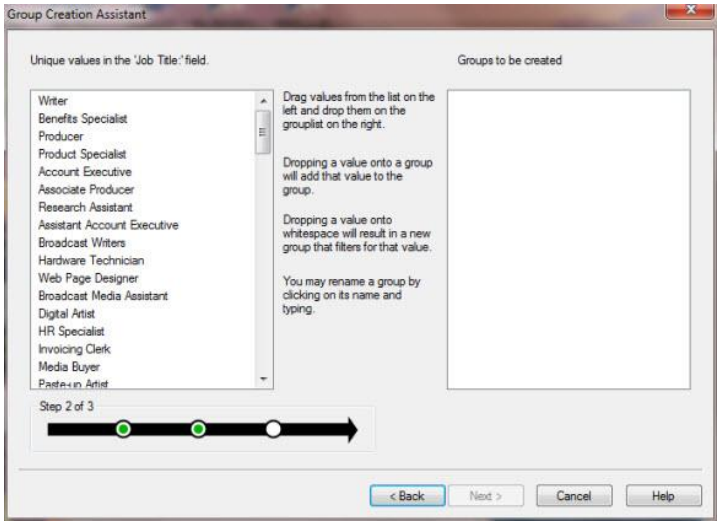

Group Creation Assistant
Unique values in the 'Job Title:' field.
Groups to be created
Writer
Benefits Specialist
Producer
Product Specialist
Account Executive
Associate Producer
Research Assistant
Assistant Account Executive
Broadcast Writers
Hardware Technician
Web Page Designer
Broadcast Media Assistant
Digital Artist
HR Specialist
Invoicing Clerk
Media Buyer
Paste-up Artist
Drag values from the list on the left and drop them on the grouplist on the right.
Dropping a value onto a group will add that value to the group.
Dropping a value onto whitespace will result in a new group that filters for that value.
You may rename a group by clicking on its name and typing.
Step 2 of 3
< Back
Next >
Cancel
Help

Figure 159.

6. Drag and drop the correct value to the right pane.

   Note: You can create more than one group by selecting multiple fields.

   If you want to use multiple values from which to create the group, drag another value from the left pane and drop it on the first value.

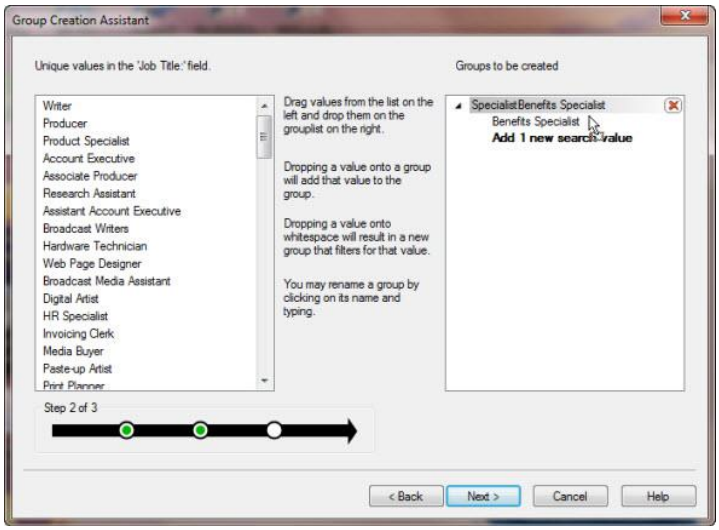

Group Creation Assistant
Unique values in the 'Job Title:' field.
Groups to be created
Writer
Producer
Product Specialist
Account Executive
Associate Producer
Research Assistant
Assistant Account Executive
Broadcast Writers
Hardware Technician
Web Page Designer
Broadcast Media Assistant
Digital Artist
HR Specialist
Invoicing Clerk
Media Buyer
Paste-up Artist
Print Planner
Drag values from the list on the left and drop them on the grouplist on the right.
Dropping a value onto a group will add that value to the group.
Dropping a value onto whitespace will result in a new group that filters for that value.
You may rename a group by clicking on its name and typing.
Specialist:Benefits Specialist
Benefits Specialist
Add 1 new search value
Step 2 of 3
< Back
Next >
Cancel
Help

Figure 160.

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If you want to create multiple groups, drag a value from the left pane and drop it in the white space of the right pane.

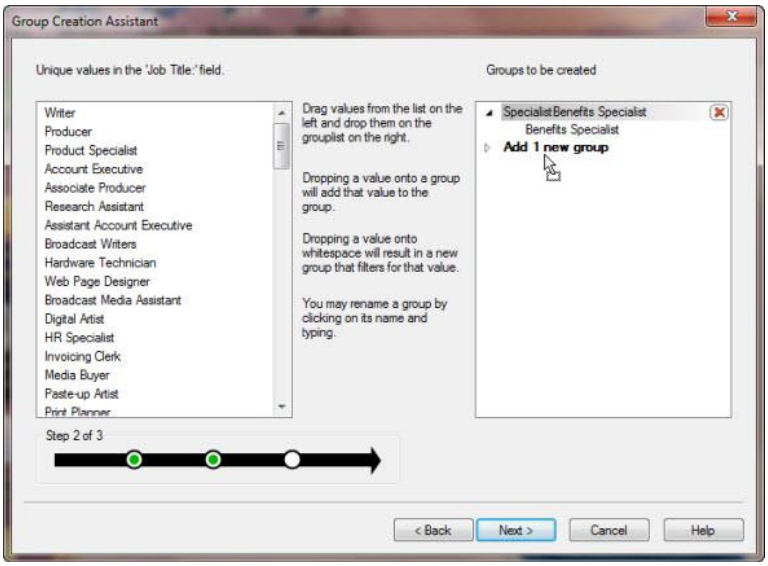

Group Creation Assistant
Unique values in the 'Job Title:' field.
Groups to be created
Writer
Producer
Product Specialist
Account Executive
Associate Producer
Research Assistant
Assistant Account Executive
Broadcast Writers
Hardware Technician
Web Page Designer
Broadcast Media Assistant
Digital Artist
HR Specialist
Invoicing Clerk
Media Buyer
Paste-up Artist
Print Planner
Drag values from the list on the left and drop them on the grouplist on the right.
Dropping a value onto a group will add that value to the group.
Dropping a value onto whitespace will result in a new group that filters for that value.
You may rename a group by clicking on its name and typing.
Specialist:Benefits Specialist
Benefits Specialist
Add 1 new group
Step 2 of 3
< Back
Next >
Cancel
Help

Figure 161.

You can create several groups at the same time using single or multiple values in each.

7. When you have created the group parameters you want, click **Next**.

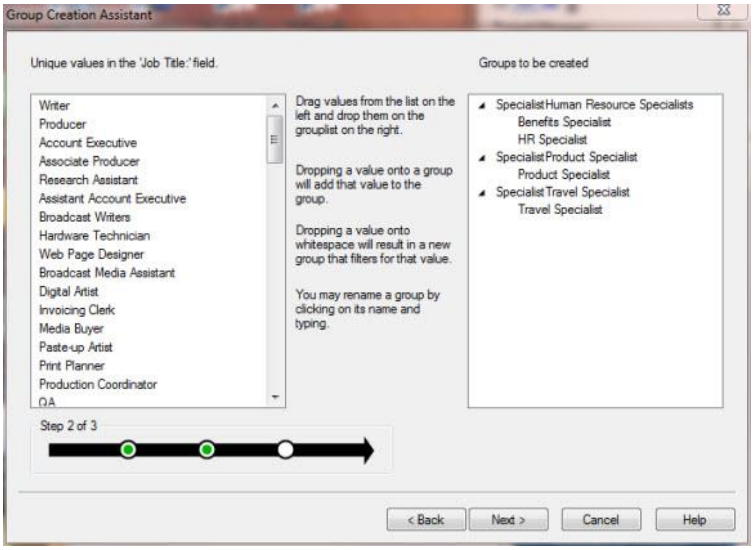


Figure 162.

The *Group Creation Assistant* dialog Step 3 opens, displaying the groups that will be created.

8. If the listed groups are correct, click **Finish**.

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If they are not correct, click **Back** and repeat the applicable steps 4 - 8.

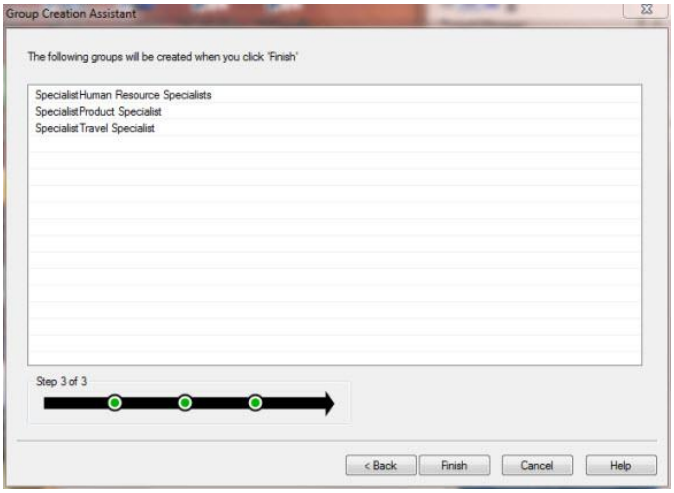


Figure 163.

The **Groups** tab of the *Search* dialog displays the groups that were created using the Groups Creation Assistant.

9. Click **Close** to return to the Chart View.

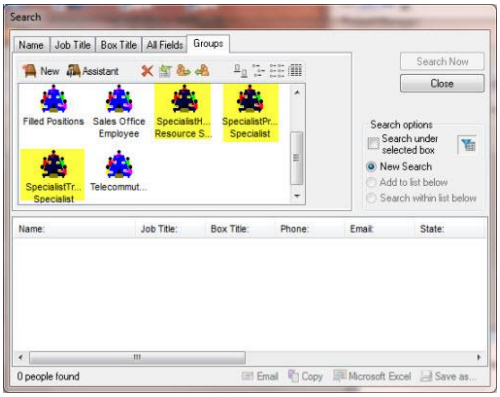


Figure 164.

10. On the Style bar, click the Filter View button.

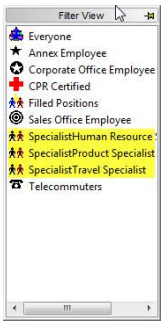


Figure 165.

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Click on a group to display it in the *Chart View*. The following example shows the Human Resource Specialist in the **Spotlight** mode.



Figure 166.

Dragging and Dropping Values in the Group Creation Assistant

When creating new groups using the Group Creation Assistant, you use drag and drop to identify a new group or value.

1. Open the *Search* dialog and click the Groups tab.
2. Click the Group Creation Assistant button 

to open the *Group Creation Assistant*.
3. Select the field containing the value you want to search against.
4. Type a prefix for the names of the groups you want to create. Click **Next**.

   The left pane of the Step 2 dialog contains the values available for grouping the data in the field you selected. These values are sorted first by "hit" count (the highest number of records to match the criteria), then alphabetically.
5. Click on the correct value, drag it to the right pane. The text “Add 1 new group” appears if no groups exist yet. Drop the value into the pane.

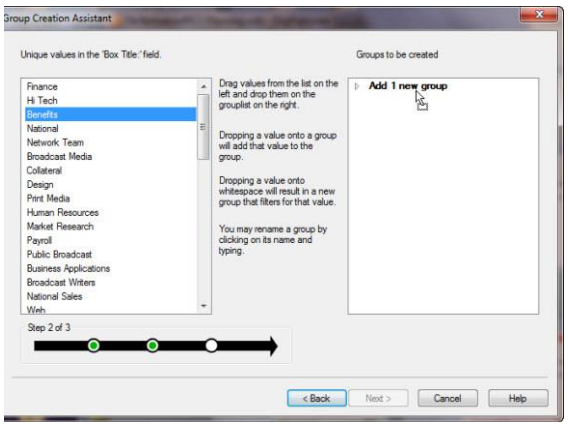


Figure 167.

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If you want to use multiple values from which to create the group, drag another value from the left pane and drop it on the first value.

As the cursor hovers over the group name, the text reads "Add 1 new search value."

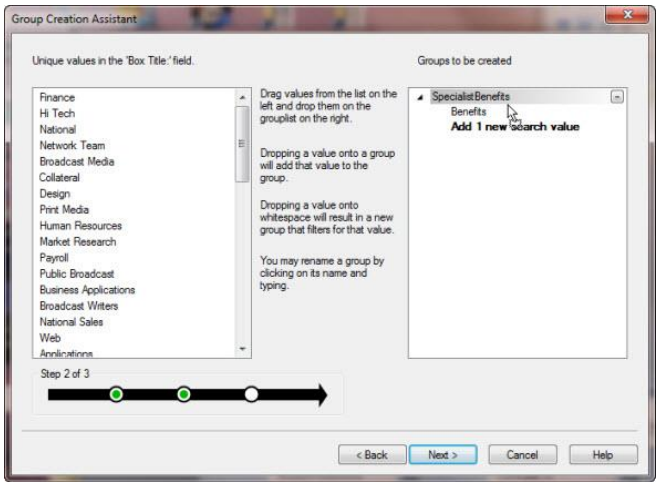


Figure 168.

You can also drag more than one value at the same time and drop them onto the group.

a. For instance, select a value.

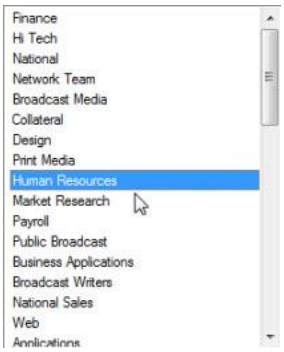


Figure 169.

b. Press the **Shift** key and select the next value.

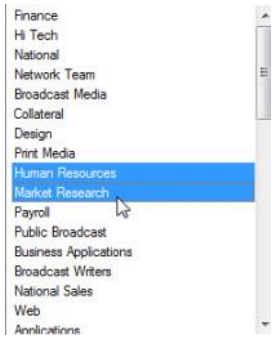


Figure 170.

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c. Drag them both into the right pane. As the cursor hovers over the group name, the text reads "Add 2 new search values."



Figure 171.

d. Drop them beneath the selected group.



Figure 172.

If you want to create multiple groups, drag a value or multiple values from the left pane and drop in the white space of the right pane.

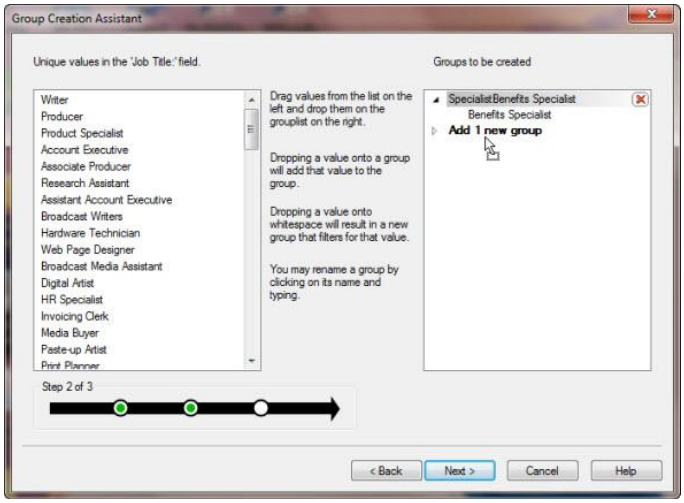

Group Creation Assistant
Unique values in the 'Job Title:' field.
Writer
Producer
Product Specialist
Account Executive
Associate Producer
Research Assistant
Assistant Account Executive
Broadcast Writers
Hardware Technician
Web Page Designer
Broadcast Media Assistant
Digital Artist
HR Specialist
Invoicing Clerk
Media Buyer
Paste-up Artist
Print Planner
Drag values from the list on the left and drop them on the grouplist on the right.
Dropping a value onto a group will add that value to the group.
Dropping a value onto whitespace will result in a new group that filters for that value.
You may rename a group by clicking on its name and typing.
Groups to be created
SpecialistBenefits Specialist
Benefits Specialist
Add 1 new group
Step 2 of 3
< Back
Next >
Cancel
Help

Figure 173.

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e. When you have created the group parameters you want, click **Next**.

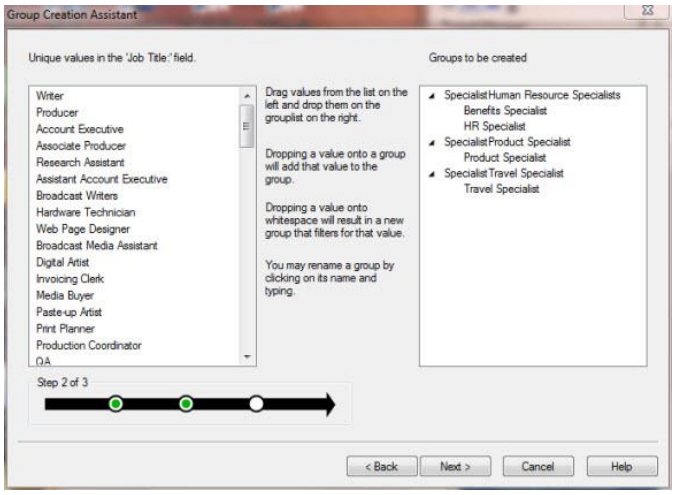


Figure 174.

The *Group Creation Assistant* Step 3 dialog opens.

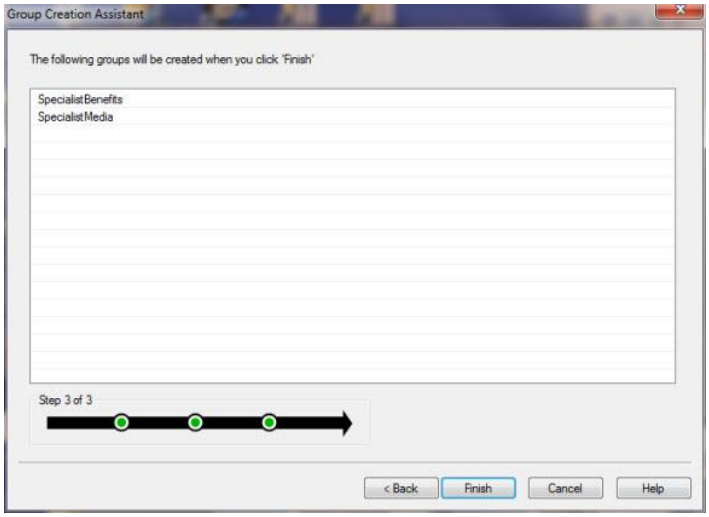


Figure 175.

f. If the groups listed are correct, click **Finish** to close the assistant.

If the groups are not correct, click **Back** to make the adjustments.

Deleting a Group

You can delete a group definition through the *Search* dialog or *Search View*.

1. Open the *Search* dialog by clicking on the Search button 

in the toolbar. In addition, you can open the List View and select the Search View pane.
2. Select the **My groups** tab in the published chart or the **Groups** tab in the application.

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3. Click the group then click the Delete Group Definition button  . The group is immediately deleted from the existing groups.

Editing a Group Definition

1. Click the Search button  in the toolbar. The *Search* dialog opens.
2. Select the **Groups** tab.
3. To modify an existing group, double-click on that group to open the Group Editor dialog. Click **Search Now** to display the group list.

   You can also open the **Search View** pane in the *List View* and select the **Groups** tab.
4. Click the Edit Group Definition  button to open the *Group Editor* dialog.
5. To add search criteria, click **Add** to copy the last criteria line, then modify it by using the **And/Or**, **Search Field**, **Compare**, **Value**, and **Match Case** fields.

   Click on the values in those fields and select the option you want to use from the drop-down list.
6. When you have added all the search criteria, click **Search Now** to conduct the search. If you are modifying an existing group, the results are added to that list. If you are creating a new group the results display in the lower pane.

   To delete an existing group criterion, highlight the record and click the Remove button  .
7. Save the changes to an existing group by clicking **Save**. Save to a new group by clicking **Save As**.

   You can continue to build criteria for additional groups or click **Cancel** to close the Group Editor dialog and return to the Search dialog or Search View.

   If you delete the custom position type, the records will return to the original position type assigned.

   Do not mix groups based on position type with position types based on groups.

Hiding Groups in Published Charts

Note: You can hide a group in the planning charts, but there is not "undo" for this feature. If you save the chart with the group hidden, you cannot access the hidden group in the planning chart. You must conduct a new search, using the same criteria, if you want to recover the group.

1. Click the Search button  in the Navigation toolbar. The *Search* dialog opens.
2. Click the **Groups** tab to display groups available in the current chart.
3. Double-click on the group you want to hide. The Group Editor dialog opens.
4. Select the **Hide this group in published chart** check box.

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Note: Hidden groups are removed from the *Filter View* and *Chart View* in both the application and the published chart. In addition, hidden groups cannot be seen in *Search View* or *Search* dialog in the published chart. They can, however, be seen in the application **Groups** tab of the *Search View* and *Search* dialog.

5. Click **Save** then **Close** the *Search* dialog.
6. Complete the publishing steps. When you open the published chart the selected group will not display in the chart or the *Filter View*.

Opening a Selected Group in the Chart View

Your chart may contain several groups. OrgPublisher displays only one group at a time, but you can quickly select and open another.

1. Click on the group filter label in the Style Bar. The Filter View opens.
2. Click on the group you want to view. The Filter View closes, and your selected group hierarchy displays in the Chart View.

   You can also use the group spotlighting feature, accessed by right-clicking on the group name in the Style bar, and selecting **Group filter in chart** then **Spotlight boxes in group**.

Removing a Person from a Group

You can remove, or delete a person from a group by using the right-click menu in the Search View.

1. Open the List View and select the **Search View** pane.
2. Click the **Groups** tab then click on the group you want to modify. The group members display in the lower pane.
3. Right-click on the name of the person you want to delete from the group. The right-click menu opens.
4. Select **Remove person from group**. The name is removed from the group.

   There is no "Undo" option for this process. If you remove a person in error, you can locate them in the chart and add them back into the group.

Sending E-mail to a Group

When a custom field type, **E-mail**, is used within a chart, the e-mail to group feature is enabled in the Search View. (This feature must be enabled in a published chart by the chart Administrator.)

Note: When working with a published chart in PDF format, end users must use Adobe® Reader® 9 and later to effectively open email links. OrgPublisher will install this free reader if it cannot find it on the end user's operating system.

1. Open the **Search View** pane of the List View.

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2. Click the **Groups** tab and select the group you want to send an e-mail to. You can also select your search criteria to create and save a group.

   Note: OrgPublisher looks for the first custom field of E-mail type when sending e-mail to a group. If you decide to use more than one e-mail address in your chart, the primary e-mail must be first in the custom field sequence order.

3. Click the Send e-mail to everybody in this group button . OrgPublisher opens your e-mail client and displays the e-mail addresses in the **To** field.

   Note: OrgPublisher defaults the maximum number of e-mail addresses to "20." The chart Administrator can override this number when publishing the chart.

4. Type your message and send the e-mail in the normal method.

Viewing Search Results in Microsoft Excel

You can open and view your search results list directly in Microsoft® Excel. All information you can see in the results list in OrgPublisher is copied into Microsoft Excel.

1. Open the List View in the chart.
2. Select the **Search View** pane.
3. Conduct the search you want, or sort the records as required. Click the Open in Microsoft Excel button at the bottom of the view. Microsoft Excel opens with your chart records list.
4. You can also open the **Groups** tab in the Search View, select a group, and click the Excel button to open the group list in Microsoft Excel.

Viewing Search Dialog Results in Microsoft Excel

You can also open your search results in the *Search* dialog in Microsoft Excel.

1. Open the *Search* dialog by clicking the Search button in the toolbar or selecting **Edit** from the Main menu and **Search** from the options list. The *Search* dialog opens at the **Name** tab.
2. Conduct the search you want then click the Open search results in Microsoft Excel button, Microsoft Excel. Microsoft Excel opens with your search results list.
3. You can also open the **Groups** tab in the *Search* dialog, select a group, and click the Open search results in Microsoft Excel button, Microsoft Excel, to open the group list in Microsoft Excel.

   Note: When sending data to Microsoft Excel, you may see a rounding up error in the font point size.

Saving and Charting Search Results as a Group

When you create a group, it can be used in any style at any time. OrgPublisher automatically creates the **Everyone** group, which is the default group displayed when you

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open your chart. OrgPublisher displays the top of chart box if no results are found for a search.

If you plan to create a large number of groups, for instance 60 - 70, it is recommended that you use more than one chart.

> **Note:** Published real-time charts provide single field searching capabilities; complex or group searching and saving **My groups** are not available.
>
> If EChart security is enabled, the published chart reflects only the search and group information accessible to the user, based on the level of security.

Conducting a Boolean Search

You can take one of two approaches to a Boolean search. You can search within a group list using Boolean criteria or add additional records to your original list. Advanced users can go directly to the Group Editor dialog and add Boolean logic, that is, true/false logic to the group search criteria.

The components of a Boolean search include:

All Fields tab

Component	Description
Search	This field displays all standard and custom fields within your chart in a drop-down list. Select the field you want to search. Sample value: **Position type** or **Status type**
For	This field varies based on the selection made in the **Search** field. Type what you want to search for or select from the options list. Sample value: Type text or select either Contractor or Filled Position.
Match	Information in the drop-down list in this field varies based on the selection made in the **For** field. Select the value you want to use for your search. Sample value: Select **= Whole Field**, **Not equal to any part of field**, or **Not equal t start of field**
Match Case	This check box is available based on the selection made in the **For** field. Displays **Yes** or **No**, depending on your search criteria. When adding new search criteria, select the check box to match upper and lower case text.
Search Now	Click this button to perform the search and display all the matching records in the lower pane of the dialog. When adding new search criteria, click this button to begin your search.
Close	Click this button at any time to close the dialog.
Search under selected box	Check box is selected if you have clicked on a specific box in your chart that is not the "top of chart." When adding new search criteria, select this radio button if you want to begin your search at a selected point in the chart. You must select a box in the Chart View to enable this feature.
New Search	Select this radio button if you want to discard current records displayed and begin a new search.
Add to list below	Click this radio button if you want to keep the existing displayed records and you want to add the results of your new search to the current list. This is an "**OR**" condition.
Search within list below	Click this radio button if you want to search only the records already displayed in a search. This is an "**AND**" condition.
(Number of) people found	Display in the lower left-hand corner indicates the number of matching records found in your search.

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Component	Description
Email	Opens your default mail client to send an email message to everyone in the selected groups or results list.
Copy	Click this button if you want to copy the list of matching records in order to paste them into another Microsoft® Windows® application.
Microsoft Excel	Click this button to open the search results in a Microsoft Excel table.
Save as group	Click this button if you want to save the current search criteria as a new group.

Group Editor dialog

Component	Description
Category	Optional field used as an umbrella name for like groups.
Group Name	Field displays the name of the group you have selected. You can type a new name.
Add	Click this button to add a new Boolean search criterion for the group definition and to copy the previous or selected criterion, if available.
Remove	Click this button to delete the selected Boolean search criterion.
Move Up	Click this button to move the selected criteria up one record in the dialog, modifying the search priority.
Move Down	Click this button to move the selected criteria down one record in the dialog, modifying the search priority.
And/Or	Select **AND** if you want your search results to meet both (or all) lines of criteria. Select **OR** if you want your search results to meet either (or some) line of criteria.
Search Field	Displays the field or fields in the chart your search is based on. When adding new search criteria, select a field you want to find from the drop-down options list. Sample value: Head count or Planned Head count.
Compare	This field varies based on the selection in the **Search Field** column. Displays the value or action performed in your search. When adding new search criteria, select a value or action from the options list. Sample value: Select **=Equal to**, **> Greater than**, **< Less than**, **<> Not equal to**, **>= Greater than or equal to**, **<= Less than or equal to**, or **Sounds Like**.
Value	This field varies based on the selection in the **Search Field** column. Displays the information you looked for in your search. When adding new search criteria, type what you want to find or select a value from the drop-down options list. Sample value: date (99/06/03) or number (12)
Match Case	This check box is available based on the selection made in the **For** field. Displays **Yes** or **No**, depending on your search criteria. When adding new search criteria, select the check box to match upper and lower case text.
Displayed image for people in this group	This field displays the icon shown in the chart for the selected group. Select an icon from the drop-down options list if you want to display a group icon in the chart.
Just selection	Check box is selected if you have clicked on a specific box in your chart that is not the "top of chart." When adding new search criteria, select this radio button if you want to begin your search at a selected point in the chart. You must select a box in the Chart View to enable this feature.
Search Now	Click this button to perform the search and display all the matching records in the lower pane of the dialog. When adding new search criteria, click this button to begin your search.
Save	Click this button to save the displayed records and group search criteria.
Save As	Click this button to save the displayed results under a new group name.

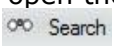
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Component	Description
Cancel	Click this button to cancel your search.
Matching records display	The lower pane in this dialog displays the existing group records or the matching records of your new search.
people found	Display in the lower left-hand corner indicates the number of matching records found in your search.

Searching All Fields

You can conduct a search in this tab by using the **Search**, **For**, and **Match** field options. See Conducting a Boolean Search for more details on the search option. You can search any field including position type, custom field, or group, as well as any of the hidden or displayed fields in your chart, including hidden or displayed custom fields.

1. Open the *Search* dialog by selecting **Edit** from the Main menu then **Search** from the pull-down options, or open the Search View pane in the List View. You can also click on the Advanced button 

in the toolbar.
2. Select the **All Fields** tab in the *Search* dialog. If you are using the Search View, click the drop-down arrow in the first field and select All Fields.
3. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.
4. If you are using the *Search View* and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
5. In the **Search** field, click the drop-down arrow to select what field you want to search. For instance, if you want to find a specific telephone number in order to identify an employee or department, you will scroll through the list until you reach the custom fields and the name for telephone number.

   You can also press the key of the first letter of the field you want to navigate through the list. Other examples include:

   - Search for open positions by selecting **Status type**.
   - Search for indirect reports by selecting **Relationship**.
   - In the **For** field, type the telephone number, or a portion of the number, you want to find.
   - If, for instance, you chose **Status type** or **Relationship**, click the drop-down arrow and select a field option.
   - In the **Match** field, indicate with the drop-down arrow what you want to match.

Field	Description
= Any Part of Field	Select this option if you want OrgPublisher to find the records that contain fields with matching criteria in any part of the searched field.
= Whole Field	Select this option if you want OrgPublisher to find the records that contain exactly matching criteria to the searched field.
= Start of Field	Select this option if you want OrgPublisher to find the records that contain matching criteria at the beginning of the searched field.

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Field	Description
Not equal to any part of field	Select this option if you want OrgPublisher to find the records that do not contain matching criteria in any part of the searched field.
Not equal to whole field	Select this option if you want OrgPublisher to find all records that do not match the exact criteria of the searched field.
Not equal to start of field	Select this option if you want OrgPublisher to find the records that match everything except the start of the field.
Sounds Like	Select this option if you want OrgPublisher to find the records that closely match the typed name or word.

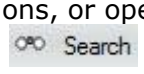
6. If you are using the *Search* dialog, select the **Match Case** check box if you want the search to match upper or lower case formats in your text.
7. If applicable, you can select a group to filter your search. Click the Search Base Group Filter button  . The Search Base Group Filter dialog opens.
8. Select the **Use a base group filter** check box.
9. Click the down-arrow to select the group you want to use as a filter.
10. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.
11. Click **Search Now** in the *Search* dialog or **Go** in the *Search View*. If you chose a group filter, OrgPublisher searches only the selected group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown.
12. If you are looking for a certain record, click on it. OrgPublisher moves to that section of the chart and highlights the record you have selected. If you are creating a new group, click Save as group.
13. Type the name you want to use in the *Enter a group name* dialog. Click **OK** to save the group.

    You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the Search View.

Searching by Box Title

You can conduct a simple search in this tab by using the **Match** field options in the *Search* dialog or by using the *Search View*.

If you want to search for a specific box title in your chart:

1. Open the *Search* dialog by selecting Edit from the Main menu then Search from the pull-down options, or open the Search View pane in the List View. You can also click on the Advanced 

button in the toolbar.
2. Select the **Box Title** tab in the *Search* dialog. If you are using the Search View, click the drop-down arrow and select the Box Title option.
3. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

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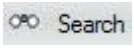
4. If you are using the *Search View* and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
5. Type all or a portion of the box title in the **Box title** field.
6. In the **Match** field, indicate with the drop-down arrow what you want to match or do not want to match. See the Searching All Fields topic for the list of match options.
7. If you are using the *Search* dialog, select the **Match Case** check box if you want the search to match upper or lower case formats in your text.
8. If applicable, you can select a group to filter your search. Click the Set or remove a base filter button,  . The Search Base Group Filter dialog opens.
9. Select the **Use a base group filter** check box.
10. Click the down-arrow to select the group you want to use as a filter.
11. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.
12. Click **Search Now** in the *Search* dialog or **Go** in the Search View. If you chose a group filter, OrgPublisher searches only the selected group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown.
13. If you are looking for a certain record, click on it. OrgPublisher moves to that section of the chart and highlights the record you have selected. If you are creating a new group, click **Save as group**.
14. Type the name you want to use in the *Enter a group name* dialog.
15. Click **OK** to save the group.

You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the *Search View*.

Searching by Job Title

You can conduct a simple search in this tab by using the **Match** field options in the *Search* dialog or by using the *Search View*.

1. Open the *Search* dialog by selecting **Edit** from the main menu then **Search** from the pull-down options, or open the **Search View** pane in the List View.

   You can also click on the Advanced 

   button in the toolbar.
2. Select the **Job Title** tab in the *Search* dialog. If you are using the Search View, click the drop-down arrow and select the **Job Title** option.

   If you have selected a specific box in the Chart View, the *Search* dialog selects the Search under selected box check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

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3. If you are using the *Search View* and want to start your search from a specific box in the chart, you must first select the box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
4. Type all or a portion of the job title in the **Job Title** field.
5. In the **Match** field, indicate with the drop-down arrow what you want to match or do not want to match. See the Searching All Fields topic for the list of match options.
6. If you are using the *Search* dialog, select the **Match Case** check box if you want the search to match upper or lower case formats in your text.

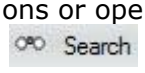
   If applicable, you can select a group to filter your search. Click the Set or remove a base filter button  . The *Search Base Group Filter* dialog opens.
7. Select the **Use a base group filter** check box.
8. Click the down-arrow to select the group you want to use as a filter.
9. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.
10. Click **Search Now** in the Search dialog or Go 

in the *Search View*. If you chose a group filter, OrgPublisher searches only the selected group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown.
11. If you are looking for a certain record, click on it. OrgPublisher moves to that section of the chart and highlights the record you have selected. If you are creating a new group, click **Save as group**.
12. Type the name you want to use in the *Enter a group name* dialog.
13. Click **OK** to save the group.

    You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the Search View.

Searching by Name

You can conduct a simple search in this tab by using the **Match** field options in the Search dialog or by using the *Search View*.

1. Open the *Search* dialog by selecting **Edit** from the menu bar, then **Search** from the pull-down options or open the **Search View** pane in the List View. You can also click on the Advanced 

button in the toolbar.
2. Select the **Name** tab in the *Search* dialog. If you are using the Search View, click the drop-down arrow and select the **Name** option.
3. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

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4. If you are using the *Search View* and want to start your search from a specific box in the chart, you must first select the box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
5. Type all or a portion of the employee's last name in the **Last name** field.
6. Type all or a portion of the employee's first name in the **First name** field, if you have that information.
7. If you are using the *Search* dialog, type all or a portion of the employee's middle name in the **Middle name** field, if you have that information.
8. In the **Match** field, indicate with the drop-down arrow what you want to match. See the Searching All Fields topic for the list of match options.

   Note: If you type a last name and a first name, OrgPublisher searches for both names, and will not show a match if only one of the names is found.
9. If you are using the *Search* dialog, select the **Match Case** check box if you want the search to match upper or lower case formats in your text.

   If applicable, you can select a group to filter your search. Click the Set or remove a base filter button  . The Search Base Group Filter dialog opens.
10. Select the **Use a base group filter** check box.
11. Click the down-arrow to select the group you want to use as a filter.
12. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.
13. Click **Search Now** in the *Search* dialog or Go  in the *Search View*. If you chose a group filter, OrgPublisher searches only the selected group and displays the matching records. If no group filter was selected, the entire chart is searched and matching records shown.
14. If you are looking for a certain record, click on it. OrgPublisher moves to that section of the chart and highlights the record you have selected. If you are creating a new group, click **Save as group**.
15. Type the name you want to use in the *Enter a group name* dialog.
16. Click **OK** to save the group.

    You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the Search View.

Adding to a Search Result List

You can combine two or more search results in order to create the unique group that you want. In addition, you can view the search results list in Microsoft Excel.

1. In the *Search* dialog, select a tab to begin your search, such as **Name** or **Job Title**. Or, if you have an existing group that you want to search, click the Groups  button in the toolbar to open the Group Editor dialog.

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2. If you have selected a specific box in the *Chart View*, the *Search* dialog selects the **Search under selected box** radio button. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** radio button to clear it.
3. Enter your search criteria and indicate if you want to **Match** part or all of the field, or **Match Case**. See the Searching All Fields topic for the list of match options.

   If you are searching the **All Fields** tab, select the **Search field** and enter or select the **For** field data, as well.
4. Click **Search Now**. The results display in the list in the lower section of the dialog.
5. If the results are what you want, click the **Add to list below** radio button to begin the second search.
6. Repeat Steps 2-5 until you have the group you want. Then click **Save as Group**.

Combining Searches

You can combine two or more searches in order to create the unique group that you want. In addition, you can view the search results list in Microsoft Excel.

1. Select a tab in the *Search* dialog or a field in the drop-down list of the Search View to begin your search. Or, if you have an existing group that you want to search, click the Groups  button in the toolbar to open the Group Editor dialog.
2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** radio button. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** radio button to clear it.
3. Enter your search criteria and indicate if you want to **Match** part or all of the field, or **Match Case**. If you are searching the **All Fields** tab, select the **Search** field and enter or select the **For** field data, as well. See the Searching All Fields topic for the list of match options.
4. Click **Search Now**. The results display in the list in the lower section of the dialog.

   If the results are what you want, click the **Add to list below** radio button.
5. Repeat Steps 2-4 until you have the group you want. Then click **Save as Group**.

Spotlighting Search Results or Group in the Chart View

You can use the Chart Spotlighting feature to highlight search results in the Chart View, or dim boxes that are not part of the search results.

1. Open the Search View.
2. Select the search criteria and click 

to begin the search.
3. When the search results display in the *Search View*, click the Spotlight search results in chart button  . The boxes in the *Chart View* that are not part of the search results are dimmed.

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4. If you want to spotlight a specific group in your chart, click on the **Groups** or **My groups** tab in the *Search View*. You can spotlight any group except the **Everyone** group. Select the group and click the Spotlight search results in chart button  . The group is spotlighted in the chart.
5. Click the button again to disable the spotlight search results feature.

> **Note:** When printing a chart with the spotlighting feature enabled, if your printer does not support AlphaBlend, your printed chart will show all boxes as in the past. See your IT administrator if you have any questions.

Using the Toolbar Search with Quick Search Results

The simple toolbar search feature in the OrgPublisher application and published chart has been modified.

1. Type a single or multiple words or initials in the **Look For** toolbar field 

.
2. Click the Go button  to begin the search navigate around the chart; this feature searches on a box-to-box basis for the next instance of a matching record.

   A list of matching results displays in the *Quick Search Results* dialog below the toolbar, the characters entered for the search are in bold font.

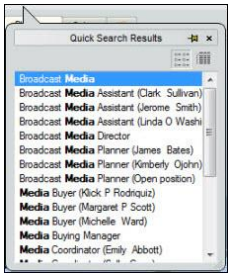

Quick Search Results
Broadcast Media
Broadcast Media Assistant (Clark Sullivan)
Broadcast Media Assistant (Jerome Smith)
Broadcast Media Assistant (Linda O Washi
Broadcast Media Director
Broadcast Media Planner (James Bates)
Broadcast Media Planner (Kimberly Ojohn)
Broadcast Media Planner (Open position)
Media Buyer (Klick P Rodriquiz)
Media Buyer (Margaret P Scott)
Media Buyer (Michelle Ward)
Media Buying Manager
Media Coordinator (Emily Abbott)

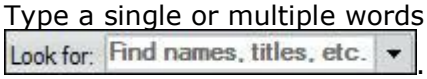
Figure 176.

3. You can select a record right away, or click the Details button  to display more information for the displayed results. Click the List button  to return the display to just the found records.

   To reuse previous searches, click on the down-arrow and select the search item you want. To clear the search list, right-click on the button and select **Clear List**.

Using the Smart Search Option

The toolbar *Quick Search Results* dialog can be used in a Smart Search option when you pin the search results into the *Search View*.

1. Type a single or multiple words or initials in the Look For toolbar field 

.

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2. Click the Go button  to begin the search navigate around the chart; this feature searches on a box-to-box basis for the next instance of a matching record.

   A list of matching results displays in the *Quick Search Results* dialog below the toolbar, the characters entered for the search are in bold font.


Quick Search Results
Broadcast Media
Broadcast Media Assistant (Clark Sullivan)
Broadcast Media Assistant (Jerome Smith)
Broadcast Media Assistant (Linda O Washi
Broadcast Media Director
Broadcast Media Planner (James Bates)
Broadcast Media Planner (Kimberly Ojohn)
Broadcast Media Planner (Open position)
Media Buyer (Klick P Rodriquiz)
Media Buyer (Margaret P Scott)
Media Buyer (Michelle Ward)
Media Buying Manager
Media Coordinator (Emily Abbott)

Figure 177.

3. Click the Pin button  in the upper-right corner of the dialog. The Search View opens, displaying the Quick Search Results list.

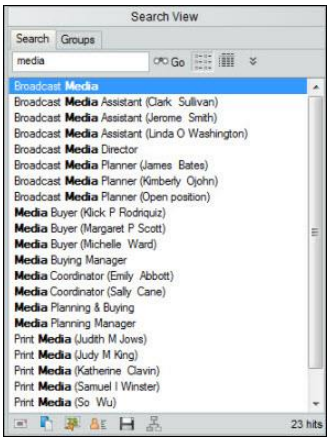


Figure 178.

Once you pin the Quick Search Results into the *Search View*, OrgPublisher identifies this as the **Smart Search** mode by the "pushed in" appearance of the chevron button. Hover the cursor over the button to see a tooltip indicating how to switch to the **Advanced Search** mode.

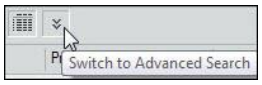


Figure 179.

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4. Select a record right away, or click the Details button  to display more information for the displayed results. Click the List button  to return the display to just the found records.

   If you select the Detail button  , the Smart Search View displays additional columns of data.

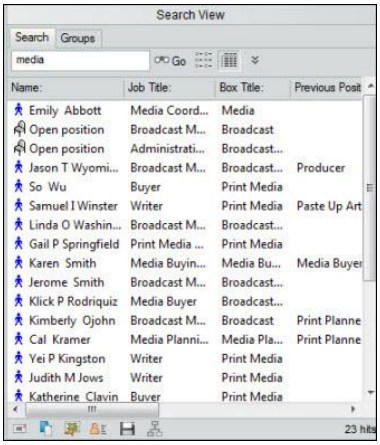


Figure 180.

5. You can search further by typing additional letters to the original search and click Go  .

6. Once you have selected the records you want, you can also select the **Groups** or **My groups** tab to save the search results as a group  , send the results to Microsoft Excel  , send the results to the clipboard to copy and paste into another application  , place the results in the Profile View  , and more.

7. When you have completed your Smart Search tasks, click the Search Mode button  to return the *Search View* to its original display, or Advanced Search, as identified by the label when you hover over the button.

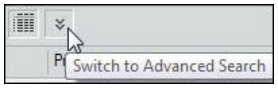


Figure 181.

You can click the button again to return to the Smart Search mode.

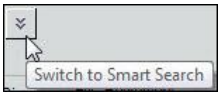


Figure 182.

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Saving a Group

1. Conduct your search using one of the *Search* dialog tabs or by using the **Search View** pane in the List View.
2. When your search result is the way you want it, click **Save as Group**. The *Enter a group name* dialog opens.
3. Type the name of the group.
4. Click **OK**. The *Search* dialog or Search View displays the **Groups** tab with the new group shown. If an end user has conducted a search in the published chart, the saved group displays in the **My groups** tab of the *Search View*.
5. If you are using the *Search* dialog, close it. Click on the down-arrow in the Styles bar. A Filter View displays your group names.
6. Click on the name of the group you want to chart. The Chart View displays the group members within the original hierarchy.

   For instance, if you searched your chart to find all open positions and saved the group, the charted group shows the boxes containing open positions and the parent boxes those open positions report to.

Auto Pinning Group or Search Results as Side-by-Side Profiles

You can use new search results or a search result from an existing group to automatically pin profiles (maximum of six records at a time) to the Profile View.

1. Conduct your search in the *Search View* or *Search* dialog.
2. Click the Show the search results in the Profile View button  . If there are more than six records in the Search Results pane, OrgPublisher selects the first six to display in the side-by-side profile.
3. Click the button again to add the next 6 records, repeating the process, if applicable, until all the records you want are in the pinned *Profile View*.
4. If the search results in less than 6 pinned profiles, you can manually add and pin additional records by selecting a record that matches your original search criteria.

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Saving Side By Side Profiles as a Group

You can create groups from the displayed and pinned side-by-side profiles.

1. Select the profiles you want as a side-by-side profile then click on Save button  .



Figure 183.

   The *Enter a group name* dialog opens.

   The default group name displays as **Profile Group**. You can keep this name or type over it with the name you want to use.

2. Click **OK**. The dialog closes and the new group is included in the Filter View in the chart.

Searching within the Group Results List

After you have done a search and a list displays in the *Search* dialog or Search View pane in the List View, you can also search within that list. This enables you to eliminate records and narrow your search criteria.

1. Click the **Search within list below** radio button.
2. If you have selected a specific box in the *Chart View*, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.
3. Choose the search tab and enter your search criteria and indicate if you want to **Match** part or all of the field, or **Match Case**. If you are using the **All Fields** tab, select the **Search** field and enter or select the **For** field data, as well. See the Searching All Fields topic for the list of match options.
4. Click **Search Now**. The new results display in the list in the lower section of the dialog.

   You can also include search results in the side by side profile by clicking the Include the search results in Profile View button  . Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the *Search View*.

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Securing Styles to a Group

With OrgPublisher styles may be secured to groups in published ECharts, which can enhance a secure rich client EChart. In securing styles to groups, you must remember that each chart viewer must have access to at least one style.

EChart security works only with an unbroken hierarchy. Orphans within a secured chart will disrupt all security controls.

> **Note:** This feature is also available in the published cross browser/Silverlight chart.
>
> Deleting a group associated with a style security makes that style available to every EChart user.

1. Select **File** from the Main menu then **Styles** from the options list. The *Styles* dialog opens.
2. Select the style you want to secure by clicking on it in the top-left pane of the dialog.
3. In the lower pane, use the down-arrow to select the group to which you want to secure the style. You may also create a new style to secure to a group.
4. Click **Close**. The *Chart View* displays your group and style.
5. Follow the EChart publishing procedure to publish your chart.

Using the Sounds Like Feature

The OrgPublisher search option allows you to search any text type fields based on a "sounds like" feature. This feature provides you with an increased chance of a successful search for people and information.

The view and dialogs affected by the **Sounds Like** match field option are:

Group Editor: Access this feature by right-clicking in a group icon in the **Groups** tab, then the **Compare** column.

Search View: Access this feature by clicking on the down-arrow in the **Match** field.

Search dialog: Access this feature by clicking on the down-arrow in the **Match** field in the Name, Job Title, Box Title, and All Fields tabs.

Search View/Search dialog

1. Open the *Search View* or *Search* dialog.
2. Select the **Name** field (or other text field) in the *Search View*, or the **Name** tab (or one of the other tabs) in the *Search* dialog.
3. Type the name as accurately as possible in the **Last** field.
4. Click on the down-arrow in the **Match** field and select **Sounds Like**.
5. Click **Go**. The search results pane displays all names that come close to the spelling you used.

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Group Editor dialog

1. Open the Group Editor dialog.
2. Click **Add** to set a new group criteria. A duplicate of the last criteria record is created.
3. Click on the **Compare** field and select **Sounds Like**.
4. Click in the **Value** field and type the name or word as accurately as possible.
5. Click **Search Now**. The search results pane displays all names or words that come close to the spelling you used.

Using the Group Filter in Searches

With OrgPublisher you can choose to filter your searches through a specific group. The filter button is included in the *Search View* and the *Search* dialog.

> **Note:** the group filter option is not available in the published chart unless you select a group for filtering other than **Everyone**.

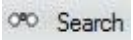
When you select a base group filter, you also limit the records displayed in the published directory view of the chart.

1. Open the *Search View* or *Search* dialog and select the search criteria you want to use. Detailed instructions on how to conduct searches is available in the Searching all Fields, Searching by Box Title, Searching by Job Title, and Searching by Name procedures in this document.
2. Click the Set or remove a base filter for searching button  . The *Search Base Group Filter* dialog opens.
3. Select the **Use a base group filter** check box.
4. Click the down-arrow to select the group you want to use as a filter.
5. Click **OK**. The dialog closes and the filter button appears to be "pressed in." This indicates that a base filter is set for your search.
6. Continue selecting your search criteria and click **Search Now**. OrgPublisher searches only the selected group and displays the matching records.
7. Click the filter button again to remove the filter, or click it twice to reopen the *Search Base Group Filter* dialog to select a new group filter.

Using the Group Editor Dialog

The *Group Editor* dialog displays all the existing groups for your chart, and enables you to modify those groups or create new groups or categories. You can also add a group icon.

> **Note:** When working with a published EChart, you can add new groups, but the existing groups cannot be modified or deleted. The new group, however, cannot be displayed in the published EChart view.

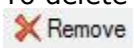
1. Click the Search button 

in the toolbar. The *Search* dialog opens. You can also select **Edit** from the menu and **Search** from the drop-down list.

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2. Click the **Groups** tab.
   - To modify an existing group, double-click on that group to open the *Group Editor* dialog. Click **Search Now** to display the group list in the lower portion of the dialog.
   - To create a new group, click the New Group Definition  button in the *Search* dialog. The *Group Editor* dialog opens.
   - You can also open the **Search View** pane in the List View and click the **Groups** tab. Click the Edit Group Definition button  to open the *Group Editor* dialog.
   - To add search criteria, click Add  to copy the last criteria line, then modify it by using the **And/Or**, **Search Field**, **Compare**, **Value**, and **Match Case** fields. Click on the values in those fields and select the option you want to use from the drop-down list. See Conducting a Boolean Search for field definitions.

     Note: If you delete the custom position type, the records will return to the original position type assigned. In addition, if you delete the custom position type, the records will return to the original position type assigned.
3. When you have added all the search criteria, click **Search Now** to conduct the search. If you are modifying an existing group, the results are added to that list. If you are creating a new group the results display.
   - If you want to add a group icon to each person's box within the group, select the down-arrow in the Displayed image for people in this group field and select the icon you want to use. You can also click **Other** and navigate to an icon of your choice.
   - Select a radio button for the icon size. Small icons inserts 16X16 pixel icons. Large icons inserts 32X32 pixel icons.
   - If you have created this group for security purposes, you can hide the group from end users by selecting the **Hide this group in published chart** check box.
   - To delete an existing group criterion, highlight the record and click Remove  .
4. Save the changes to an existing group by clicking **Save**. Save to a new group by clicking **Save As**.
5. You can continue to build criteria for additional groups or click **Cancel** to close the *Group Editor* dialog and return to the *Search* dialog or Search View.

   Note: If EChart security is enabled, the published EChart reflects only the information accessible to the user, although field labels display in the dialog.

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Archive Charts

With OrgPublisher you can save a "snapshot" of an organizational chart and use OrgHistory to archive it for future reference.

You can add an archive schedule at the same time you publish it using the *OrgHistory Archives* dialog.

Topics Pertaining to this Section	
Auto-archiving Charts	Scheduling a Daily Job
Comparing Two Charts	Scheduling a Monthly Job
Creating a New Archive Chart	Scheduling a One Time Only Job
Deleting an Archive Chart	Scheduling a Weekly Job
Deleting an Archive Schedule	Updating an Archive Definition
Generating a Change Report	Updating an Archive Schedule
Exporting Change Report Data	Using the OrgHistory Archive Browser
Resetting the Starting Box	Using the OrgHistory Archives Dialog
	Work with Signed and Read-Only Archive Charts

Note: Always open the OrgHistory Archives dialog to verify that your scheduled chart archived at the correct time.

If you are working with the OrgPublisher Web Administration server, all archived charts will be created in the server **ArchivedCharts** folder. In addition, if end users must access archived charts, they must be stored in the **SourceCharts** folder.

You can create a "read-only" archived chart just once a day (using the One time only scheduling option). If you want to archive an updated version of your "read-only" chart, you can schedule it to run the next day. A "read-only" archived chart can be overwritten with an updated version of the same chart. A message displays verifying that the end user wants to overwrite the "read-only" archive.

Auto-archiving Charts

With OrgPublisher, you can now archive a chart at the same time you publish it.

1. Follow the Publishing Wizard for the PluginX, EChart rich client, or EChart thin client format.

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Note: The Position ID type provides a unique record number across all charts. If the charts you are comparing charts that do not contain a Position ID type in field 17 or a custom field position ID, OrgPublisher uses the person ID in field 5 from the Input File Layout.

If neither a position nor person ID exist, an error message displays and the comparison does not occur. For the most consistent results, it is recommended that you assign a unique identifier field for each record in charts that you want to compare.

After you make all your selections in the wizard dialogs, the next to last dialog presents archive options.


Publishing Wizard
OrgPublisher can keep an archive of your chart at the interval you specify. OrgPublisher will store copies of your chart as a historical archive
This feature is extremely useful for tracking changes in an organization. In addition to creating easily viewable chart archives, OrgPublisher can generate change reports that detail differences between 2 charts.
Keep an archive of this chart
Specify the folder where the archives will be stored:
C:\Archives\Charts\
Browse...
Archives will be created on this interval:
Every time the chart is published
Weekly
Monthly

Figure 184.

2. Select the **Keep an archive of this chart** check box.
3. Type or **Browse** to the location where you want to store the archives. Chart archive names are generated using the publishing definition name and date.
4. Select the interval at which you want the chart to archive, **Every time the chart is published**, **Weekly**, or **Monthly**.
5. Click **Next** and complete the *Publishing Wizard*.

   If position IDs or person IDs are missing, this dialog prompts you to add this information to your data.

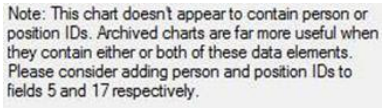

Note: This chart doesn't appear to contain person or position IDs. Archived charts are far more useful when they contain either or both of these data elements. Please consider adding person and position IDs to fields 5 and 17 respectively.

Figure 185.

Note: When archiving from the Publishing Wizard, the OrgHistory definition is not automatically created. If you create a publishing schedule for the chart, the archive is also scheduled.

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Creating a New Archive Chart

With OrgPublisher you can save a "snapshot" of an organizational chart and use OrgHistory to archive it for future reference.

1. Click the Manage OrgHistory Archives  button in the Main toolbar. The *OrgHistory Archives* dialog opens. You can also select **Tools** from the Main menu then **Manage OrgHistory Archives** from the options list.
2. Click **New**. The OrgHistory Archive Wizard opens.
3. Type or **Browse** to the folder where you want to store your archived charts.
4. Accept the default name for the archived chart, which is the chart name, or type a new name. When the archived chart is saved, OrgPublisher adds the date to the beginning of the file name, for instance, "20050815_Martin." Click **Next**.
5. Select the **Password protect this chart** check box if you want to assign a password to the archived chart. Type the password and select the encryption method radio button, **40 bit encryption** or **128 bit encryption**.
6. All fields display in archived charts. If your chart contains secure custom fields you can choose to remove the data from those secured fields in the archived chart. Select the **Remove secure field data** check box. Click **Next**.
7. OrgPublisher defaults to **Sign archived charts**. If you do not want to archive the chart with a signature, clear the check box. See the Working with Signed and Read-Only Archive Charts section for more information.
8. OrgPublisher also defaults to **Mark archived charts as read-only**. You can clear the check box if you do not want to archive the chart as read-only. Click **Next**.

   Note: You can create a "read-only" archived chart just once a day (using the "One time only" scheduling option). If you want to archive an updated version of your "read-only" chart, you can schedule it to run the next day.
9. If you highlighted a box other than the top of chart in OrgPublisher, you can select the **Exclude positions above** check box to archive the chart only from the selected box down.
10. If you navigated through the chart you want to archive and left the cursor at a box other that the top box in the chart, you can click **Reset Starting Box**. Click **Next**.
11. You can select to archive your chart immediately or later. Select the appropriate radio button.
    - **Execute now** archives the chart immediately, placing it in the folder you designated in the wizard. The *Archive Charts* dialog opens to display the names of all your archived charts. A message displays verifying that the chart has been archived with a link you can click to preview the archived chart.
    - **Execute later** places the name of your chart in the *Archive Charts* dialog but will not create the archived chart until you return to the dialog and click **Archive**.
    - **Schedule now** opens the OrgPublisher Automatic Task Scheduler which walks you through scheduling a date and time to archive your chart.

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Comparing Two Charts

You can compare two organizational charts in the OrgPublisher application that have identical custom field definitions, and generate a change report. Fields that do not match will not be listed on the change report.

In addition new or renamed custom fields will not match when comparing charts and will not be included in the change report.

1. Select **Tools** from the Main menu then **Compare two charts** from the options list. The *Compare Charts* dialog opens.

   You can also click **Compare** in the **Definitions** tab of the *OrgHistory Archives* dialog.

2. Type or **Browse** to the first chart in the **Select the first (older) chart to compare** field. This should be the original or older chart.

3. Type or **Browse** to the second chart in the **Select the second (newer) chart to compare** field. This should be the modified or newer chart.

4. You can also select the default options for your change report by clicking **Customize change report**.

5. Click **View Change Report** to view the results of the comparison, or click **Cancel**.

   Depending on which viewing option you selected when you customized the report, it displays either in a web browser or in Microsoft® Excel.

   The report defaults to the name OrgPubChangeReport.htm and is placed in a temporary folder. You can rename the report and save it in a specified folder.

   The figures in the **Before** column represent the first chart you selected. The figures in the **After** column represent the second chart you selected.

   Note: You can also compare two archived charts and generate a change report using the OrgHistory Archives dialog.

Archive Definitions Tab

The **Definitions** tab of the *OrgHistory Archives* dialog provides the same elements as the OrgHistory Archive Wizard, and is available as soon as you have created a definition or archived a chart. You can access the dialog by clicking the Managing OrgHistory Archives button  in the toolbar.

This tab displays information about your archive definitions for the current chart. Buttons enable you to create **New**, and **Update** or **Delete** existing archive definitions. A button is also available to **Archive** your chart if you selected the **Execute Later** option in the Publishing Wizard. You can **Browse** through your archive definitions or **Compare** archived charts using the OrgHistory Archive Browser.

Archive Schedule tab

The **Archive Schedule** tab of the *OrgHistory Archives* dialog provides a list of your archived chart schedules and the last time the archive schedule ran. The **Archive Schedule** tab displays information about the chart schedules for your archive definitions. Buttons enable you to create **New** and **Delete** or **Update** existing schedules.

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The **Archive Schedules** tab displays the **Name** of the archived chart, the **Publishing Definition** of the original chart, the **Schedule** for archiving, and the **Last run** date and time of the archived chart.

Deleting an Archive Chart

You can delete an archived chart definition using the OrgHistory Archives dialog.

1. Click the Managing OrgHistory Archives button  in the toolbar to open the *OrgHistory Archives* dialog. The **Definitions** tab displays all archive chart definitions.
2. Select the definition you want to delete. Click **Delete**. The archive chart file is removed.
3. Click **OK** to close the dialog and return to the chart.

Deleting an Archive Schedule

You can delete an archive schedule using the OrgHistory Archives dialog.

1. Click the Managing OrgHistory Archives button  in the toolbar to open the *OrgHistory Archives* dialog.
2. Select the **Archives Schedule** tab.
3. Select the schedule you want to delete. Click **Delete**. The archive schedule is removed.
4. Click **OK** to close the dialog and return to the chart.

Generating a Change Report

When working with archived charts, you can create customized change reports.

Change reports show the differences in a chart from one point in time to another.

1. After you have archived at least 2 versions of your selected chart, click the Manage OrgHistory Archives button  . The *OrgHistory Archives* dialog opens.

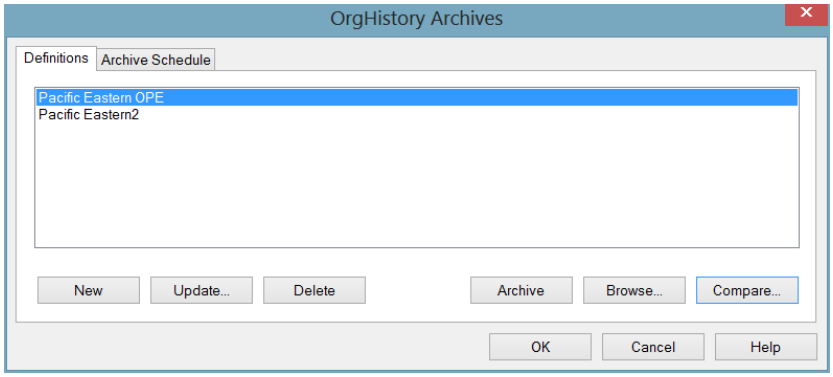


Figure 186.

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2. Click **Compare**. The *OrgHistory Archive Browser* dialog opens.

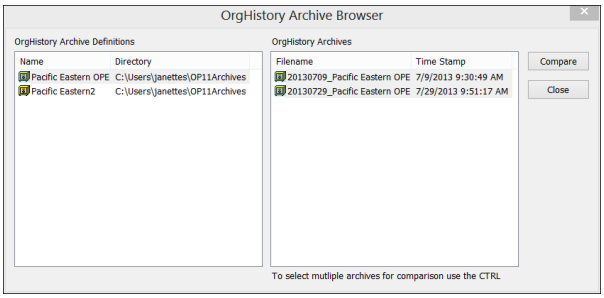


Figure 187.

3. Select the chart files you want to compare from the **OrgHistory Archives** panel on the right. Click **Compare**. The *Change Report Options* dialog opens.

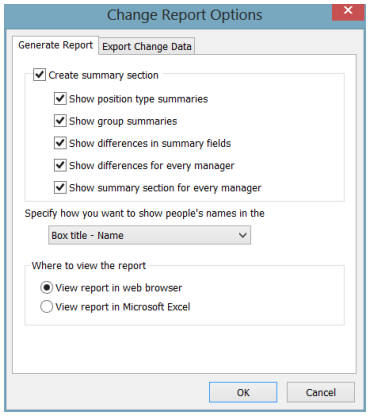

Change Report Options
Generate Report
Export Change Data
Create summary section
Show position type summaries
Show group summaries
Show differences in summary fields
Show differences for every manager
Show summary section for every manager
Specify how you want to show people's names in the
Box title - Name
Where to view the report
View report in web browser
View report in Microsoft Excel
OK
Cancel

Figure 188.

4. Make your choices for summary and difference information in the **Create summary section**.
5. In the middle pane, click the down-arrow and select how you want to show names.
6. In the last pane, select where you want to view the report, either in the web browser of in Microsoft Excel. Click **OK**. See the Exporting Change Data for detailed information about the **Export Change Data** tab.

   The change report runs and, when complete, the report opens.

Exporting Change Data in Archived Charts

When you generate change reports you can choose to export data that has changed in order to create a comma separated file reflecting changes to upload into a source HR system. You select the desired fields, and the resulting Microsoft Excel file contains three tabbed worksheets:

- Added position data records
- Removed position data records
- Edited data records (field data modified or movement in the chart)

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1. After you have archived at least 2 versions of your selected chart, click the Manage OrgHistory Archives button  . The *OrgHistory Archives* dialog opens.
2. Click **Compare**. The *OrgHistory Archive Browser* dialog opens.
3. Select the chart files you want to compare from the **OrgHistory Archives** panel on the right. Click **Compare**. The *Change Report Options* dialog opens.
4. If applicable, select the report data you want to see in the **Generate Report** tab. Click the **Export Change Data** tab.

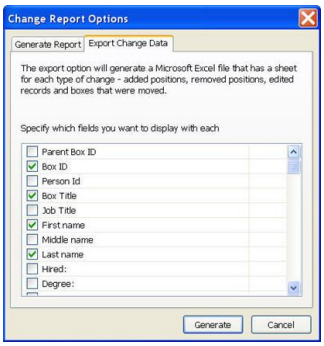

Change Report Options
Generate Report
Export Change Data
The export option will generate a Microsoft Excel file that has a sheet for each type of change - added positions, removed positions, edited records and boxes that were moved.
Specify which fields you want to display with each
Parent Box ID
Box ID
Person Id
Box Title
Job Title
First name
Middle name
Last name
Hired:
Degree:
Generate
Cancel

Figure 189.

5. Select the fields you want to see in each summary section of the report, such as position types or groups.
6. Click **Generate**.

   If you selected to **View report in web browser**, the browser displays a basic HTML report that summarizes the changes made in the chart using **Before** and **After** columns, as well as the **Change percent**.

   - The HTML file is saved to your local drive in the in the **Local Settings/Temporary** folder. You can also save the report by using the browser **File>Save As** option.
   - If you selected **View report in Microsoft Excel**, both the report sheet and export data sheets open with the 3 tabbed sheets.

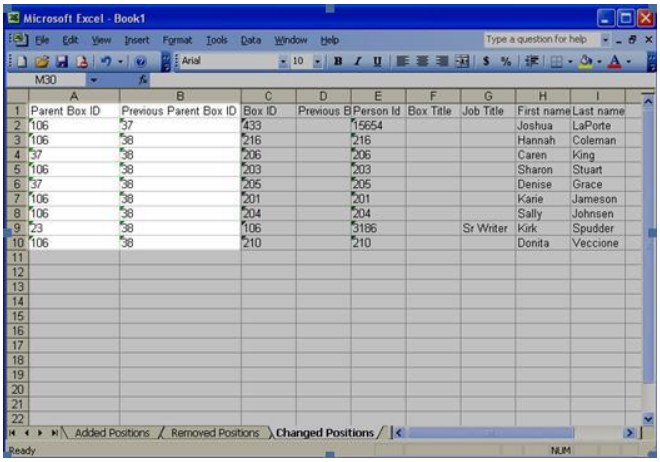


Figure 190.

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Resetting Starting Box in OrgHistory Archive Charts

When you use OrgPublisher's OrgHistory feature, you can use the reset starting box option in the OrgHistory Archive Wizard if the archive definition is assigned to start at a box ID that no longer exists in the chart or if you want the archived chart to start at the currently selected top box shown in the Chart View. You can use this feature to archive only a specific part of your hierarchy within the chart.

1. Follow the *OrgHistory Archive Wizard*, selecting where you want to store the archived chart, whether or not you want to password protect the archive or remove secure fields, mark archives as read-only, until you reach the dialog with the **Reset Starting Box** button.
2. If you select **Exclude positions above**, the archived chart will only provide information from the selected box and below in the hierarchy.

   If you do not select **Exclude positions above**, users can navigate upward in the chart to the additional hierarchical information.
3. Click **Reset Starting Box**. A message verifies that you want to reset the top of box. Click **Yes**. Click **No** if you decide not to reset the top of box.
4. Continue with the *OrgHistory Archive Wizard*.

Updating an Archive Definition

With OrgPublisher you can use OrgHistory save a "snapshot" of an organizational chart and archive it for future reference. You can also update that snapshot if an archive definition already exists.

Note: Always open the OrgHistory Archives dialog to verify that your scheduled chart archived at the correct time.

If you are working with the OrgPublisher Web Administration server, all archived charts will be created in the server **ArchivedCharts** folder. In addition, if end users must access archived charts, they must be stored in the **SourceCharts** folder.

You can create a "read-only" archived chart just once a day (using the **One time only** scheduling option). If you want to archive an updated version of your "read-only" chart, you can schedule it to run the next day.

A "read-only" archived chart can be overwritten with an updated version of the same chart. A message displays verifying that the end user wants to overwrite the "read-only" archive.

1. Click the Manage OrgHistory Archives  button in the Main toolbar. The *Archive Definitions* dialog opens. You can also select **Tools** from the Main menu then **Manage OrgHistory Archives** from the options list.
2. Click **Update**. The *OrgHistory Archive Wizard* opens.
3. Complete the wizard dialog prompts to update the archive definition following the steps for Creating a New Archive Chart.

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Updating an Archive Schedule

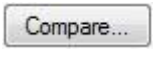
You can modify an existing schedule to archive your charts. You can start the task scheduler at the end of the *OrgHistory Archive Wizard* or in the **Archive Schedule** tab of the *OrgHistory Archives* dialog.

1. Select **Tools** from the Main menu then **Manage OrgHistory Archives** from the options list. You can also click the Manage OrgHistory Archives  button in the toolbar. The OrgHistory Archives dialog opens at the **Definitions** tab.
2. Click on the **Archive Schedule** tab.
3. Select a schedule from the displayed list and click **Update**. The *OrgPublisher Automatic Task Scheduler* opens. If your selection was **Schedule Now** in the *OrgHistory Archive Wizard* the scheduler opens when you click **Finish**. You can also access the task scheduling in the **Archive Schedule** tab by selecting the archive definition and clicking **Update** or **New**. Click **Next**.
4. In the *Schedule Name* dialog, the archive **Name** you selected displays. You can type a new name. Click **Next**.
5. Select the scheduling definition from the displayed list you want to archive. If this is your first archive, only this definition displays in the list pane of the dialog. Click **Next**.
6. In the Schedule Frequency dialog, select the radio button that fits your scheduling needs. Options are One time only, Daily, Weekly, and Monthly. Click **Next**.
7. If you selected **One time only**, the next dialog prompts you to **Select the time of day** and **Select a date** using the drop-down arrows. Click **Next**.
   - If you selected **Daily**, the next dialog prompts you to select a frequency to archive, such as every 2 day or **Every weekday**. You must also **Select the time of day** and **Select the date** to begin. Click **Next**.
   - If you selected **Weekly**, the next dialog prompts you to select a frequency to archive, such as every 3 weeks. You must also Select the time of day as wells as **Select the days of the week** to archive. Click **Next**.
   - If you selected **Monthly** the next dialog prompts you to select the **Day** or specified day, such as the **First Monday**. You must also **Select the time of day** and **Select the specific months**, such as **January** and **April**.
8. In the *User ID* dialog, your login ID displays in the **Type user name** field. Complete the **Type password** and **Confirm password** fields. Click **Next**.
9. The last dialog displays if you have successfully completed the scheduling. Click **Finish**. You can also click **Back** and change your scheduling information.

Using the OrgHistory Archive Browser

Once you have created one or more archive definitions, you can access these definitions through the *OrgHistory Archives* dialog.

- Click 

or 

to open the *OrgHistory Archive Browser*.
- The left-hand pane lists the **OrgHistory Archive Definitions** for the current chart.

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- When you double-click on a definition, it displays in the right-hand pane, **OrgHistory Archives**. Select the definition then click View to open the archive.
- If you accessed the *OrgHistory Archive Browser* by clicking Compare... in the **Definitions** tab, you can use the **Ctrl** key to select archives then click **Compare** to view a Change Report.

Using the OrgHistory Archives Dialog

The *OrgHistory Archives* dialog opens when you click on the Manage OrgHistory Archives button  in the Main toolbar or when you click **Finish** in the *OrgHistory Archive Wizard* after you have selected the **Schedule Now** option. The *OrgHistory Archives* dialog contains two tabs, **Definitions** and **Archive Schedule**. You can also access the *OrgHistory Archive Browser* from this dialog.

You can use this dialog to open the *OrgHistory Archive Wizard* to create a new archived chart or update existing archived chart definitions, review a list of archived charts and schedules. You can also delete archived charts and set new schedule times to automatically archive charts.

> **Note:** Always open the OrgHistory Archives dialog to verify that your scheduled chart archived at the correct time.

Work with Signed and Read-Only Archive Charts

You can use OrgHistory to take a "snapshot" of your organizational chart and archive it for reference at a later time. The OrgHistory Archive Wizard walks you through selecting a directory location, assigning a name and password, as well as add a signature to the archive.

- OrgHistory defaults to **Sign archived charts**, which means that if the archived chart is created and opened in OrgPublisher 7 and later, it cannot be modified. However, the archived chart can be modified if it is opened from a previous version of OrgPublisher or in a hex editor.
- When you open an altered "signed" archived chart in OrgPublisher 7 and later, you receive a message telling you that it has been modified. You can choose not to archive a chart with a signature by clearing the check box in the *OrgHistory Archive Wizard*.
- OrgHistory also defaults to **Mark archived charts as read-only**, which means that the "read-only file" system flag is set. The chart can be overwritten if the flag is removed. You can choose not to archive as read-only by clearing the check box in the *OrgHistory Archive Wizard*.

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Preview and Modify Charts before Printing

After charts are published, and before they are printed, OrgPublisher enables you to modify your chart by changing the chart layout to better fit on a printed page.

Topics Pertaining to this Section	
Book Style	**Wall Chart Style**
Advanced Page Optimizer Settings	Changing the Chart Layout
Changing the Chart Layout	Copying the Print Preview Chart
Creating a Top of Page List	Moving Boxes in Print Preview
Modifying Print Settings	Opening Print Header/Footer Options in Print Preview
Previewing a Book Style Chart	Previewing a Wall Style Chart
Saving the Book Style Page Modifications	Print Enhancements
Selecting Pages to Print	Sending the Chart to Microsoft PowerPoint
	Showing/Hiding Headers and Footers

Book Style

Creating a Book Style Top of Page List

You can create a list of boxes that you want to print at the top of pages in your Book Style printed chart or PDF published chart.

1. In the Chart View, right-click on a name or box you want as the top of a page in your Book Style printed chart. This box must be a hierarchically logical box, such as a manager's box. An assistant's box cannot be selected as the top of a page.
2. Select the **Top of page (Book style printing)** option. When you open the print preview, the selected box will display at the top of the page for the selected hierarchy.
3. Select **File** from the menu and **Print preview** from the pull-down list. The *Print Preview Type* dialog opens.
4. Select the **Book style preview** radio button and click **OK**. The *Book Style Print Preview* opens.
5. Click **Settings**. The *Book Style Print Settings* dialog opens.
6. Select the **Page customization list** button. A list box displays a list of pages with custom settings, including selected names for top of page.
7. You can remove a name from the top of page list by clicking on the corresponding check box and clicking **Remove checked items**. The name is removed from the list and, if it is not a hierarchically logical top of page box, that page no longer displays in the preview pane.

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Note: Because Book Style printing handles hierarchy in a consistent manner, you may right-click on a box and see that this option is not enabled. Similarly, you cannot remove a "hierarchically logical" top of page box.

Modifying Book Style Print Settings

You can modify your initial settings made while in the Print Wizard for Book Style printing in the Book Style Print Preview window.

Note: The Book Style printing and preview option is only available if you have selected File, Print Options, then Print Wizard.

1. Follow the *Print Wizard* to the *Settings* dialog, which provides several options to choose from when printing your chart as a book.
2. Select the **Use classic book style printing** radio button if you want to print all pages using chart layout 4.

Use the page optimizer

3. If you choose to use the optimizer for printing your chart as a book, you can accept automatic optimizer settings or customize the settings.

Setting	Description
Use easy settings	Select this radio button to use the slider to print your chart on **More pages** or **Fewer pages**. OrgPublisher automatically arranges the chart to best fit the boxes on the pages.
Preferred layout	Choose the radio button to print your chart pages in one of the layout options.
Use custom optimizer settings	Select this radio button to print your chart as a book using custom optimizing settings.
Custom settings	Click this button to open the *Advanced Page Optimizer Settings* dialog. In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the Advanced Page Optimizer, selecting the maximum number of reporting boxes and the layout to display per page. When a page fits none of the criteria selected in the *Advanced Settings* dialog, OrgPublisher prints the chart using layout 4 with two levels displayed.
Page customization	Select this option to view a list of boxes that you have either customized within the Print Preview window, or have chosen to print at the top of each page of your book style chart. In order to print a box at the top of a page, you must first select the box for this purpose in the Chart View, by right-clicking on a box and selecting **Top of Page**.

4. You can select the **Use easy settings** radio button and use the slider to enable OrgPublisher to print on more or fewer pages. If you choose **More pages**, OrgPublisher will print fewer boxes on a page. If you choose to **Fewer pages**, OrgPublisher will fit as many boxes on a page as possible.
5. Using the standard settings, select a **Preferred layout** to print your chart pages.
6. You can select the Use custom optimizer settings radio button and click **Custom settings** to open the *Advanced Page Optimizer Settings* dialog.

   In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings

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using the *Advanced Page Optimizer Settings* dialog, selecting the maximum number of reporting boxes and the layout to display per page.

When a page fits none of the criteria selected in the **Custom Settings**, OrgPublisher prints the chart using layout 4 with two levels displayed.

7. You can set a maximum number of report boxes and select a layout and the number of levels to print on a page in order to print your chart on as few pages as possible. Click **OK**.
8. If you have already previewed your chart and selected boxes to print at the top of each page, you can select **Page customization list** in order to delete any as a top of page box. Deleting the box from this list does not remove the box from the chart. Click **OK**.

Boxes across on book style pages

9. You can allow OrgPublisher to determine the chart row size or manually select the number of boxes in a row.

Setting	Description
Automatically set row size	Select this radio button to let OrgPublisher set the number of boxes per row and size these boxes to fit each page.
Set maximum row size	Select this radio button to manually set the maximum number of boxes to be printed in a row. The minimum number of boxes across is 4. (The chart style is automatically stacked, which means there are two levels of the organization per page and the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.)

10. You can choose to **Print index** to accompany your book pages.
11. Select **Show page number circles** if you want each book style page to print the circled page numbers.
12. If opened from the Print Wizard, select **Show the print preview** check box if you want to modify individual pages in the book style print job.
13. If opened in the Print Preview, and you have included groups in your chart, or use custom colors, you can select the **Include Legend** check box to help identify the groups and colors by the icons displayed in the chart legend.
14. If you want OrgPublisher to adjust the size of the boxes to fit on each page, select the **Zoom each page to fit** radio button.
15. Click **Next**. Click **Header/Footer** to change either the header or footer text. The Print Header/Footer Options dialog opens.
16. Follow the prompts to select header and footer options. Click **OK** to accept the changes and close the dialog.
17. Click **Finish** to complete the *Print Wizard*.

Moving Boxes in Print Preview

In OrgPublisher the Print Preview for Wall Style and Print Preview for Book Style dialogs enable you to modify your chart for printing by moving boxes (and the box reporting lines) to better fit on the page.

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1. Open *Print Preview* by selecting **File** then **Print preview** from the options list. The *Print Preview Type* dialog opens.
2. Select the **Wall chart preview** or **Book style preview** radio button. The *Print Preview* dialog opens.
3. Select a box by clicking on it. The box is highlighted.
4. Holding down the mouse cursor, move the box to where you want it on the page.

> **Note:** Note that the connecting line moves with the box. Because OrgPublisher is not a drawing tool, you do not want to move the box across from or above its manager box because the reporting line draws through it.
>
> If you select the top box in a hierarchy, all reporting boxes move as well. Remember these basic rules when moving boxes:
>
> - Vertical lines move with the boxes.
> - The boxes at the either end of a row must stay at the end because the corners of the horizontal and vertical lines which link these boxes are "owned" by the boxes.
> - Unexpected results occur if you move boxes outside of the OrgPublisher hierarchical drawing standards.
>
> These standards assure that an OrgPublisher chart can be viewed without written explanation and be understood anywhere in the world.

5. Release the box by moving the cursor to a blank space on the page and click.
6. You can reverse that change by clicking the Undo  button.
7. Select **Print** if you want to open the Print Wizard to print the chart or Close Print Preview without printing.

Previewing a Book Style Chart

You can preview charts before printing them to check how the chart fits on the pages. The Chart View is the only view you can preview.

> **Note:** If you choose to print a chart legend in your org chart, it does not display in the Book Style Print Preview. It does, however, print.

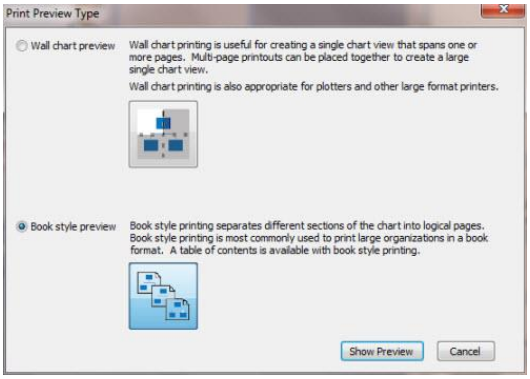
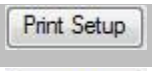
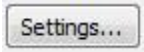
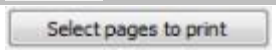

Print Preview Type
Wall chart preview
Wall chart printing is useful for creating a single chart view that spans one or more pages. Multi-page printouts can be placed together to create a large single chart view.
Wall chart printing is also appropriate for plotters and other large format printers.
Book style preview
Book style printing separates different sections of the chart into logical pages. Book style printing is most commonly used to print large organizations in a book format. A table of contents is available with book style printing.
Show Preview
Cancel

Figure 191.

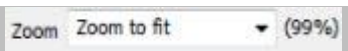
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1. Select **File** from the menu bar, then **Print Preview** from the pull-down menu. The *Print Preview* dialog opens and the chart displays as it will print for each page. You can also click on the Print Preview  button in the toolbar. The *Print Preview Type* dialog opens.
2. Select the **Book style preview** radio button and click **Show Preview**. The *Book Style Print Preview* dialog opens and the chart displays as it will print on each page. The top pane displays thumbnails of each page. The lower pane displays the selected page. The *Book Style Print Preview* enables you to format individual pages. Each page is displayed in a thumbnail.
3. The *Print Preview* Menu bar contains buttons that enable you to print, modify your Book Style print settings, or cancel the preview. Click on a button for its definition.

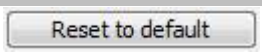
Button	Action Performed
	Click this button to print the chart. This button opens your system Print dialog.
	Click this button to open the system *Print Setup* dialog in order to select the printer device, paper size, orientation, and source.
	Click this button to open the *Book Style Print Settings* dialog. You can also access the Print Header/Footer Options dialog, the page customization list, or enable the Print a chart legend feature.
	This button closes the Book Style Print Preview dialog.
	Click this button to print only selected pages.
	Click this link to access the OrgPublisher Printing Tips web page for ideas on successfully printing your chart.

You can use the *Print Preview* toolbar buttons to change the layout for the printed page, change the number of levels to print on a page, and zoom to a selected percent per page.

Button	Action Performed
	Click this button to select **Layout 1**, the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	Click this button to select **Layout 2**, the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	Click this button to select **Layout 3**, the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.
	Click this button to select **Layout 4**, the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.
	Click this button to select the number of levels from the drop-down list that you want to display. Printing **All Levels** is now an option in Book Style.
	Click this button to set the zoom percent for the chart display. The default is **Zoom to fit**.

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Button	Action Performed
	Click this button to place employees in individual boxes below the supervisor box. (Same as Auto Build option.)
	Click this button to place employees in a box below the supervisor box. (Same as Auto Build option.)
	Click this button to place employees in the same box as the supervisor. (Same as Auto Build option.)
	Click this button to use the Compact Build Mode in the print preview.
	Click this button to reset the chart boxes with employees and supervisors in normal build. (Same as Auto Build option.)

Click **Print** to print the chart. This button opens your system *Print* dialog.

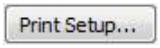
4. Or, you can close the *Print Preview* without printing the chart by clicking **Cancel**.

Print Enhancements Using Print Preview

The OrgPublisher Print Preview features have been enhanced to provide more chart printing options. You can see detail of all the enhancements in the Previewing a Book Style Chart and Previewing a Wall Style Chart topics.

When working with a published Thin Client chart, OrgPublisher also provides a popup option to select the number of levels to print.

Book Style preview

- Both the Wall style and Book style previews now contain a Print Setup button  for easier access to your print client.
- The Book Style preview now provides the ability to print all levels of the chart using the Levels button  .
- The *Book Style Print Settings* dialog includes the Header/Footer button  to open the *Print Header/Footer Options* dialog in order to configure the header and footer display.

Wall Style preview

The Wall Style Preview provides the preview and print controls at the top of the window. The controls also provide a section with thumbnails that give you an idea of what your chart will look like when you select a specific layout.

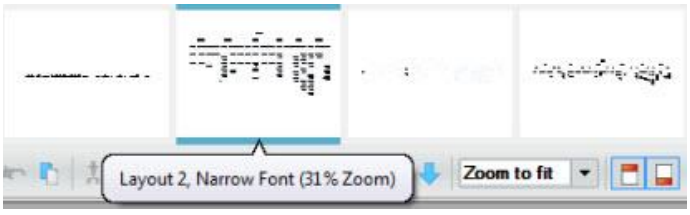


Figure 192.

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The thumbnails display a tooltip showing the percent zoom necessary for the chart to fit the page. The first thumbnail shows the current default setting for the preview. The thumbnails are sorted by the largest percent (least shrinkage) first.

However, if a thumbnail is within 5% of the thumbnail preceding it, then OrgPublisher checks to see which thumbnail is squarer; that one will be the first in the list.

Click the thumbnail you want to use, and it layout is displayed in the preview pane.

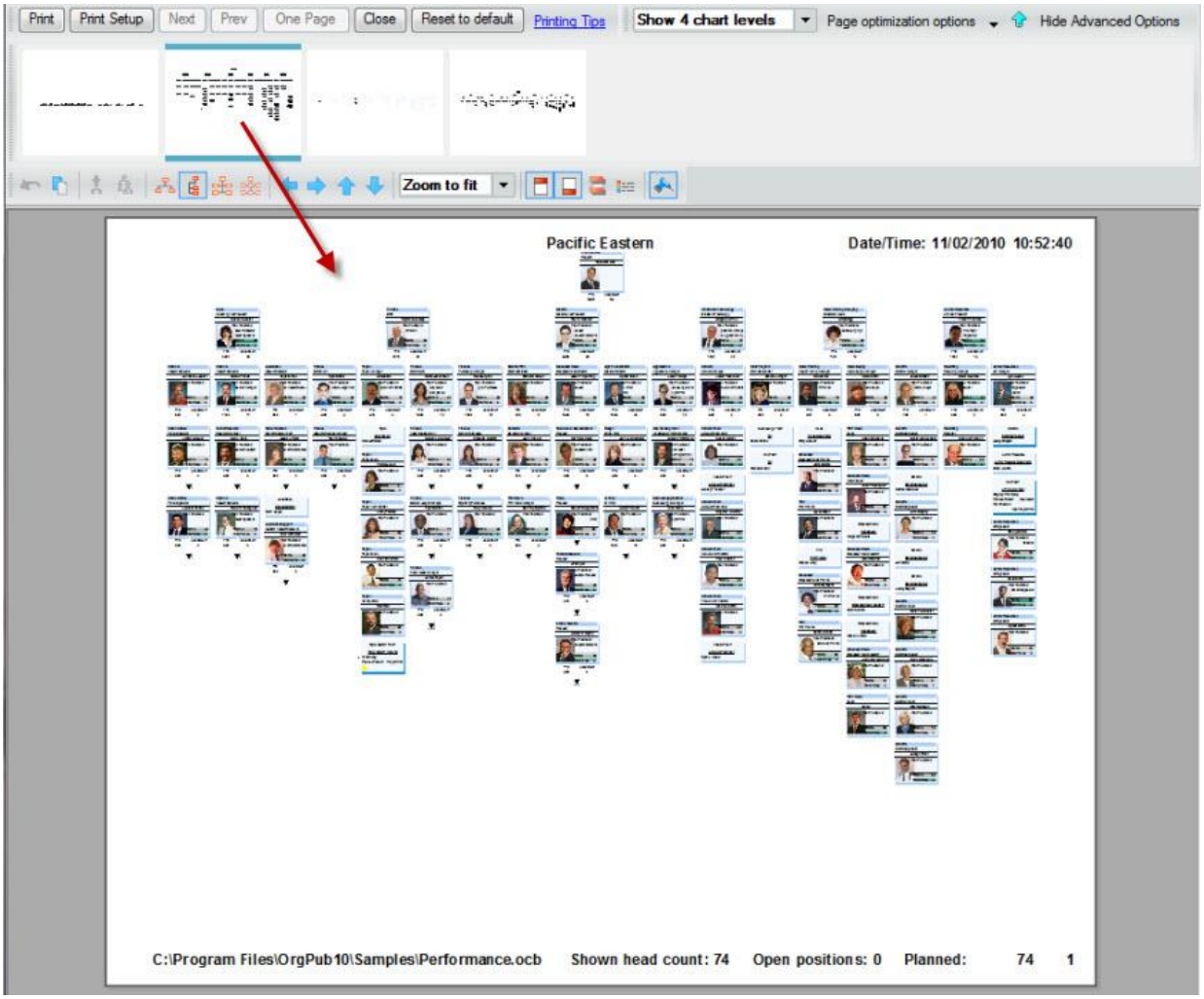


Figure 193.

The default chart layout in Wall Style preview is based on the number of levels displayed in the Chart View.

- If 2 levels are displayed
  - If there are 8 or fewer direct reports, chart layout 1 is used.
  - If there are more than 8 reports, chart layout 4 is used.
- If 3 or more levels are displayed, chart layout 2 is used.

If you accept the default Wall Style preview settings, then no check is performed on the size of the chart when the preview is opened.

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If you select one of the suggested Wall Style thumbnails, then OrgPublisher checks to see if the chart must be shrunk by 50% to fit on a single page when the preview. If so, then the zoom is set to 80%. In all other cases, zoom-to-fit is the default.

In addition, the Wall Style preview includes new buttons:

- Print Setup... - opens you system *Print Setup* dialog to select printer, paper size, orientation, and source.
- Reset to default - removes all modifications made to the preview layout and returns to the OrgPublisher default layout.
- Page optimization options - presents options, depending on the layout selected, to optimize the chart layout on the page.
- **Compact boxes** - reduces the box size, field size, and drill arrow lines; shrinks box shadow.
- **Use narrow font** - changes font to Arial Narrow 8pt.
- **Put employees in box with manager** - Turns on Auto Build; available only when at least 1 leaf node box is visible.
- **Hide secondary fields** - Turns on Compact Build mode.
- **Customize** - Enabled if **Hide secondary fields** is selected; opens the *Select fields to print* dialog, displaying box fields to show or hide; the default is to print only box title and name.

Note: If the Advanced Box Layout Editor was used in the chart, **Hide secondary fields** and **Customize** are not available.

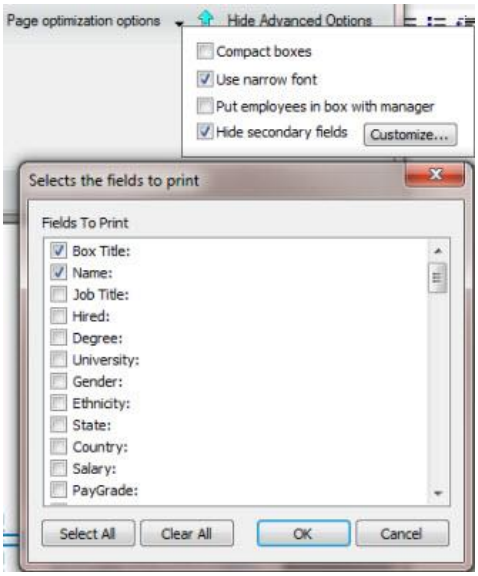


Figure 194.

- Show Advanced Options - Opens the Wall Style Preview Format toolbar in order to set top of chart, choose layout, move boxes, and more.

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Saving the Book Style Page Customizations

With OrgPublisher you can save any modifications you make to individual pages in the Book Style Print Preview and PDF publishing format.

1. Open the *Book style preview* to change page layouts or zoom percent.
2. Click **Settings**, and use the *Book Style Print Settings* dialog to suppress the display of page numbers in circles, or delete a specified top of printed page box.

   Click **Page customization list** to open the *Book style page customization* list box and review the pages which you have customized or chosen a specific top of page box.

   Select a page or all of the pages, and remove them from the customization list. This deletes the modifications you have made in the *Book Style Print Preview*. Click **OK** or **Cancel** to return to the *Book style print settings* dialog.
3. Continue with the settings modifications or click **OK** to return to the *Book Style Print Preview*.
4. Click **Print** to print the Book Style chart or **Cancel** to return to the Chart View without printing.

   A message displays asking if you want to save your changes. You do not have to save the settings in order to print the customized pages.
5. Click **Yes** to save the page customizations or **No** to discard them.

   The **Book Style Print Preview** closes and your system printer *Settings* dialog may open before the print job completes.

Choosing Book Style Print Settings

When publishing or printing your chart in PDF format, you can accept default settings, or select settings of your own when the *Publishing Wizard* reaches the *Settings* dialog. These include chart settings, paper, font, and image choices. PDF settings not only help you arrange the chart to fit on pages in the PDF file but will also affect the printed document.

The *Settings* dialog is similar to the dialog used in the *Book Style Print Preview*. You can accept defaults, work with the classic book style print settings such as chart layout 4, or select custom optimizer settings.

Settings Option	Description
Use classic book style printing - all pages are printed using layout 4	Select this radio button if you want to print the Book Style chart which uses chart layout 4, stacked boxes. There are two levels of the organization per page and the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.
Use the page optimizer	Selecting this radio button enables you to make several choices to customize the PDF print settings. Use standard settings is the default option. You can move the slider to optimize more or less. If you choose to optimize more, OrgPublisher will fit as many boxes on a page as possible. If you choose to optimize less, OrgPublisher will print fewer boxes on a page.
Use easy settings	Select this radio button to use the slider to print your chart on More pages or Fewer pages. OrgPublisher automatically arranges the chart to best fit the boxes on the pages.

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Settings Option	Description
Preferred layout	Choose the radio button to print your chart pages in one of the layout options.
Use custom optimizer settings	Select this radio button to print your chart as a book using custom optimizing settings.
Custom settings	Click this button to open the Advanced Page Optimizer Settings dialog. In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the Advanced Page Optimizer Settings dialog, selecting the maximum number of reporting boxes and the layout to display per page. When a page fits none of the criteria selected in the Advanced Settings dialog, OrgPublisher prints the chart using layout 4 with two levels displayed.
Page customization list	Select this option to view a list of boxes that you have either customized within the Print Preview window, or have chosen to print at the top of each page of your book style chart. In order to print a box at the top of a page, you must first select the box for this purpose in the *Chart View*, by right-clicking on a box and selecting Top of Page.
Depth	Click the down-arrow and select the number of levels you want to include.
Automatically set row size	Selecting this radio button enables OrgPublisher to automatically select the number of boxes to print per row.
Specify maximum row size	Selecting this radio button enables you to specify the number of boxes per row to be printed on a page.
Print index	Select this check box if you want to print an index for the book style PDF printed chart.
Include Legend	Select this check box to print the chart legend.
Print Header	Select this check box to print a header in your chart.
Hyperlinks	Select this check box to include existing hyperlinks in the PDF.
Show page number circles	Select this check box if you want to print the connecting page numbers in circles on each printed PDF page.
Print Footer	Select this check box to print a footer in the chart.

Once you've published the chart, a dialog displays the progress of the PDF conversion. After the conversion is complete a message box displays the number of chart pages created.

Selecting Pages to Print in Book Style Preview

With OrgPublisher 8.1 and later, you don't have to print the entire book in the *Book Style Print Preview* - you can select just the pages you want to print.

1. Select **File** from the Main menu then **Print Preview** from the pull-down menu. The *Print Preview* Type dialog opens. You can also click on the Print Preview  button in the toolbar.
2. Click Show Preview. The *Book Style Print Preview* window opens, and the chart displays as it will print for each page. The box with the yellow border indicates the current view shown in the preview. See the Previewing a Book Style Chart procedure for additional tasks you can perform.

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3. Click the Select pages to print button to enable the selection of specific pages for printing. The *Selective printing mode enabled* message notifies you that selective printing is enabled. You can choose not to display the message again by selecting the **Don't show this dialog again** check box. The individual page thumbnails now include a printer icon .

4. Select the pages that you do NOT want to print. The print icon changes .

   If you choose not to print only selected pages, click Cancel print page selection. You can also right-click on a printer icon to use the context menu. Options are **Select all pages to print** and **Clear all pages**.

   If you choose to print the selected pages only, click Print....

Changing the Chart Layout in the Book Style Print Preview

The *Book Style Print Preview* window enables you to modify your chart by changing the chart layout on each page to better fit on a printed page.

> **Note:** Changing the chart layout can nullify previous modifications made in Print Preview, so you should select your layout before performing other tasks such as setting levels or zooming in or out.

You must have Print Wizard selected in **File> Print Options** in order to access the Book Style Print Preview.

1. Open *Print Preview* by selecting **File** from the menu bar, then **Print Preview** from the pull-down menu. You can also click on the Print Preview button in the toolbar. The *Print Preview Type* dialog opens.
2. Click the **Book style preview** radio button then **Show Preview**. The *Book Style Print Preview* window opens and the top pane displays thumbnails of each page as it will print. The lower pane displays the selected page.
3. To change the chart layout for a specific printed page, select the page you want to modify in the thumbnail pane and click one of the layout buttons in the toolbar.

Chart Layout button	Chart Layout Description
	Layout 1 - Click this button to select the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	Layout 2 - Click this button to select the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	Layout 3 - Click this button to select the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.
	Layout 4 - Click this button to select the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

4. Click **Print** if you want to print the chart or **Cancel** the print preview without printing.

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Advanced Page Optimizer Settings

In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the *Advanced Page Optimizer Settings* dialog, selecting the maximum number of reporting boxes and the layout to display per page. When a page fits none of the criteria selected in the *Advanced Settings* dialog, OrgPublisher prints the chart using layout 4 with two levels displayed.

Sending the Chart to Microsoft PowerPoint

With OrgPublisher you can copy the chart directly to Microsoft® PowerPoint. This provides enhanced chart graphic quality and flexibility within PowerPoint presentations. All the information you can see in the OrgPublisher chart is sent to PowerPoint.

> **Note:** This feature disables the header and footer options, as well as the index or chart legend for Book style. In addition, the page number circle drill buttons are not available for the copy to PowerPoint option.

1. In the Main toolbar, click the Send to Microsoft PowerPoint button  . The *Microsoft PowerPoint Preview* dialog opens.
2. Select either the **Wall chart preview** or **Book style preview** radio button. Click **OK**. The *Microsoft PowerPoint Preview* window opens.
3. Make your modifications in the Wall style or Book style preview. If you click **Settings** in the Book Style preview, the *Book Style PowerPoint Settings* dialog opens. Follow the Choosing Book Style Print Settings procedure to choose the PowerPoint settings.

   Click Send. The Send to PowerPoint dialog opens.
4. In the **Page Range** section, select which pages you want to send to **PowerPoint**, **Current Page**, **All Pages**, or **Pages** and enter the page numbers or range.
5. In the **Chart Options** section, select the optional chart features you want to send to PowerPoint. These features include **Show Drill Buttons**, **Chart Title**, which allows you to choose **Title is part of image** or **Title is part of slide**, and **Chart Background**, which allows you to choose **Background is part of image** or **Background is part of slide**.
6. In the **PowerPoint Options** section, the default is **Use currently open presentation**. Clear this check box if a current presentation does not exist or you want to choose a different presentation.
7. In the **Image Options**, select **Copy as metafile** or **Copy as bitmap**.
8. Click **OK** once you have selected all the options you want to use. Microsoft PowerPoint opens with the chart embedded in the slides.

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Wall Style

Changing the Chart Layout in Wall Style Print Preview

The *Wall Chart Print Preview* window enables you to modify your chart by changing the chart layout to better fit on a printed page.

> **Note:** Changing the chart layout can nullify previous modifications made in Print Preview, so you should select your layout before performing other tasks such as showing/hiding the header.

Thumbnail selection

The *Wall Style Preview* has been configured with thumbnails that give you an idea of what your chart will look like when you select a specific layout.

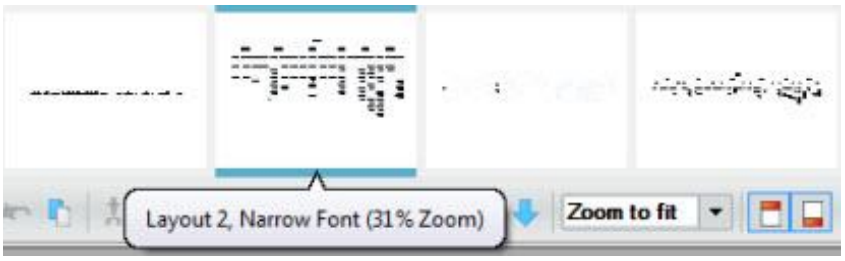


Figure 195.

The thumbnails display a tooltip showing the percent zoom necessary for the chart to fit the page. The first thumbnail shows the current default setting for the preview.

The thumbnails are sorted by the largest percent (least shrinkage) first. However, if a thumbnail is within 5% of the thumbnail preceding it, then OrgPublisher checks to see which thumbnail is squarer; that one will be the first in the list.

> **Note:** A thumbnail may be blank when previewing larger charts or in charts displaying all levels using less than 1% zoom. Hover the cursor over the thumbnail area to view a description of the layout option.

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Click the thumbnail you want to use, and it layout is displayed in the preview pane.

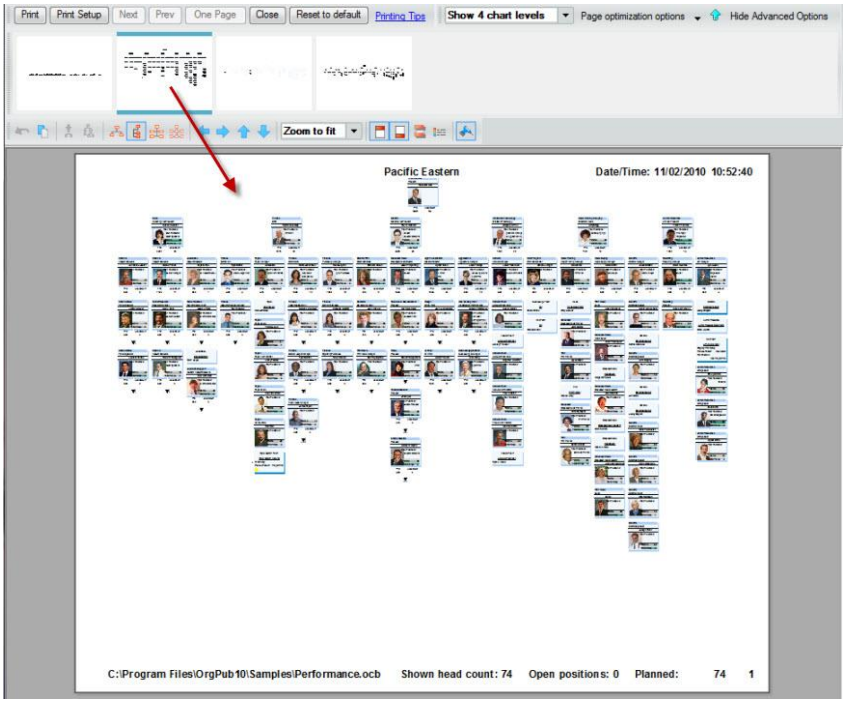


Figure 196.

Chart Layout buttons

1. Open *Print Preview* by selecting **File** from the Main menu then **Print Preview** from the pull-down menu. You can also click the Print Preview  button in the toolbar. The *Print Preview Type* dialog opens.
2. Click the **Wall chart preview** radio button then **Show Preview**. The *Wall Chart Print Preview* window opens displaying the chart as it will appear in print form.
3. To change the chart layout for the printed page, click one of the layout buttons in the toolbar.

Chart Layout button	Chart Layout Description
	**Layout 1** - Click this button to select the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	**Layout 2** - Click this button to select the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	**Layout 3** - Click this button to select the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.
	**Layout 4** - Click this button to select the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

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Select **Print** if you want to open the Print Wizard to print the chart or **Close** the print preview without printing.

Copying the Print Preview Chart

You can copy the Wall style chart from the Print Preview window and paste it into another Microsoft® Windows application. The chart headers and footers are also copied.

> **Note:** This preview chart copy function copies with OLE embedding enabled, which enables you to manipulate the chart if you paste it into an application that can edit metafiles, such as Microsoft Word or PowerPoint.

1. Open the *Print Preview* by selecting **File** from the Main menu then **Print preview** from the options list. You can also click the Print Preview  button in the toolbar. The *Print Preview Type* dialog opens.
2. Click **OK** to accept the default type or select the **Wall chart preview** radio button. The *Print Preview* window opens.
3. Modify the chart as needed, such as moving the chart or boxes, or selecting a new layout.
4. Click the Copy button  in the toolbar.
5. Paste the chart into the desired application. The chart displays in the new application.
6. **Close** the *Print Preview* dialog.

Moving Boxes in Print Preview

In OrgPublisher the Print Preview for Wall Style and Print Preview for Book Style dialogs enable you to modify your chart for printing by moving boxes (and the box reporting lines) to better fit on the page.

1. Open the *Print Preview* by selecting **File** from the menu then **Print preview** from the options list. The *Print Preview Type* dialog opens. You can also click the Print Preview button  in the toolbar.
2. Select the **Wall chart preview** or **Book style preview** radio button. The *Print Preview* dialog opens.
3. Select a box by clicking on it. The box is highlighted.
4. Holding down the mouse cursor, move the box to where you want it on the page. Release the box by moving the cursor to a blank space on the page and click.

   You can reverse that change by clicking the Undo  button.
5. Select **Print** if you want to open the Print Wizard to print the chart or **Close** *Print Preview* without printing.

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Showing/Hiding Headers and Footers in Print Preview

In OrgPublisher the Print Preview for Wall Style dialog enables you to modify your chart for printing by showing or hiding the header and footer information on the printed page. The default is to show and, therefore, print the header and footer. The *Print Preview* dialog displays the header and footer as they will print.

1. Open **Print Preview** by selecting **File** from the Main menu then **Print Preview** from the pull-down menu. The *Print Preview* dialog opens and the chart displays as it will print. You can also click on the Print Preview button in the toolbar.
2. To hide the chart header, click the Show/Hide Header button in the toolbar. The header text is hidden in the preview window and will not print. Click the Show/Hide Header button again to display and print the header text.
3. To hide the chart footer, click the Show/Hide Footer button in the toolbar. The footer text is hidden in the preview window and will not print. Click the Show/Hide Footer button again to display and print the footer text.
4. Select **Print** if you want to open the Print Wizard to print the chart or **Close** *Print Preview* without printing.

Previewing a Wall Style Chart

You can preview charts before printing them to check how the chart fits on the pages. The Chart View is the only one you can preview. Modifications made in the *Print Preview* window now enable you to fine-tune a chart for printing, for instance, by moving boxes or a selection of boxes or changing the chart layout.

1. If you have **Print Wizard** selected in the **Print Options**, and you select **File**, **Print Preview**, the *Print Preview Type* dialog opens, requiring a selection of either **Wall chart preview** or **Book style preview**.
2. Open the *Print Preview* by selecting **File** from the menu then **Print preview** from the options list. The *Print Preview Type* dialog opens. You can also click the Print Preview button in the toolbar.
3. The default selection is the preview type you used last. If you are not using the Print Wizard, OrgPublisher assumes you will print as a Wall style chart. Click **OK** to accept the default Wall chart preview type. The *Print Preview* opens.

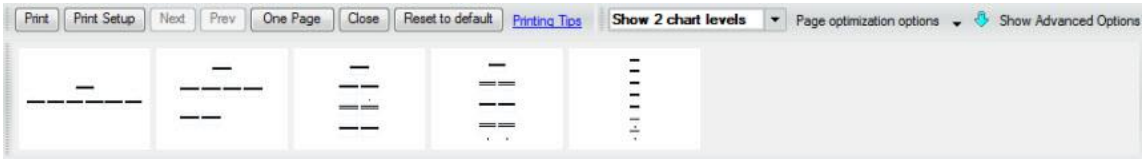


Figure 197.

The preview now displays the Menu bar as well as thumbnails for preview layouts.

The thumbnails display a tooltip showing the percent zoom necessary for the chart to fit the page. The first thumbnail shows the current default setting for the preview. The thumbnails are sorted by the largest percent (least shrinkage) first. However, if a

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thumbnail is within 5% of the thumbnail preceding it, then OrgPublisher checks to see which thumbnail is squarer; that one will be the first in the list.

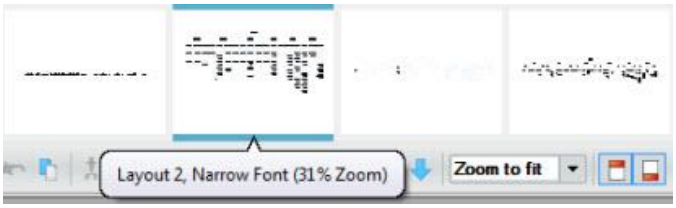


Figure 198.

4. Click the thumbnail you want to use, and it layout is displayed in the preview pane.

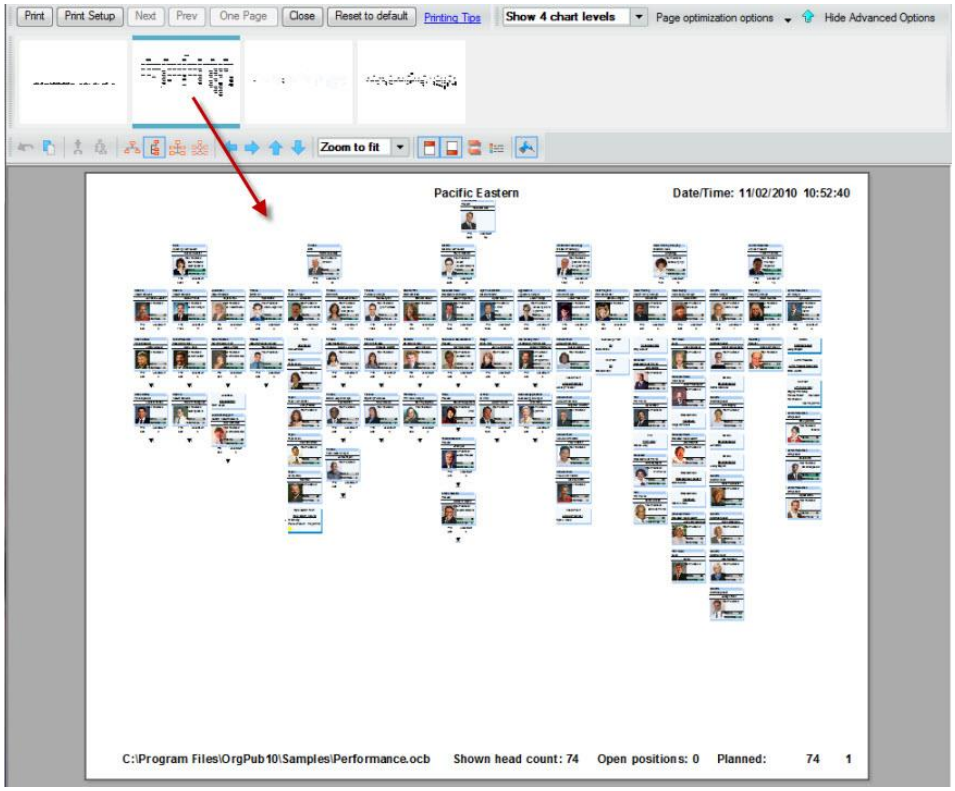


Figure 199.

The Menu bar contains buttons that enable you to print, move from page to page, zoom in or out and change from a one page view to two page. Additional buttons have been added for page optimization and advanced options.

The Menu bar buttons include:

Button	Action Performed
Print	Click this button to print the chart. If you have Print Wizard selected in Print Options, this button opens the Print Wizard. If you do not have Print Wizard selected, this button opens your system Print dialog.
Print Setup	Click this button to open the system Print Setup dialog in order to select the printer device, paper size, orientation, and source.

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Button	Action Performed
Next	If your chart will print on multiple pages, click this button to view the next page.
Prev	If your chart will print on multiple pages, click this button to view the previous page. This button is enabled only after you've clicked Next Page.
One Page	This button indicates your chart can print on multiple pages. Click Next Page to see a page preview. After you have clicked this button, it reads Two Page. Click to return to the single page preview.
Two Pages	If your chart will print on multiple pages, this button enables you to see two pages at a time in the preview window. This button is enabled only after you have clicked Next Page. After you have clicked this button, it reads One Page to return to the single page preview.
Close	This button closes the Wall Chart Style Print Preview dialog.
Reset to default	Click this button to reset the chart boxes with employees and supervisors in normal build. (Same as Auto Build option.)
Show 2 chart levels	Click this button to select the number of levels from the drop-down list that you want to display.
Page optimization options	Click this button to display the check box options for optimizing chart boxes on a page. Options vary, depending on the selected layout. Compact boxes - reduces the box size, field size, and drill arrow lines; shrinks box shadow. Use narrow font - changes font to Arial Narrow 8pt. Put employees in box with manager - turns on Auto Build; available only when at least 1 leaf node box is visible; displays all employees in the same box as the assigned manager. Put employees in box below manager - available only when at least 1 leaf node box is visible; displays reporting employees in a box below assigned manager. Hide secondary fields - turns on Compact Build mode. Customize - enabled if Hide secondary fields is selected; opens the Select fields to print dialog, displaying box fields to show or hide; the default is to print only box title and name.
Show Advanced Options	Click this button to display the preview Advanced toolbar.
Hide Advanced Options	Click this button to hide the preview Advanced toolbar.

Wall Style preview contains an advanced toolbar, which offers additional flexibility and control. The toolbar buttons include:

Button	Action Performed
	Click this button to reverse the latest action. May be repeated to undo additional actions.
	Click this button to copy the chart displayed in the preview to another application. Photos in the chart are also copied using this button.
	Clicking this button designates the selected box as the top of chart for the selected style.
	Click this button to display the whole chart from the highest box in the hierarchy.
	Click this button to select **Layout 1**, the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.

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Button	Action Performed
	Click this button to select **Layout 2**, the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	Click this button to select **Layout 3**, the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.
	Click this button to select **Layout 4**, the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.
	Click this button to move the entire Chart View to the left.
	Click this button to move the entire Chart View to the right.
	Click this button to move the entire Chart View up.
	Click this button to move the entire Chart View down.
	Click this button to set the zoom percent for the chart display.
	Click this button to show or hide the header text.
	Click this button to show or hide the footer text.
	Click this button to open the Print Header/Footer Options dialog and select your print options.
	Click this button to print a chart legend page.
	Click to display or hide the drill buttons for printing.

5. Use the Print Preview toolbar buttons to set top of chart, display the whole chart, change the layout for the printed chart, move individual boxes, move the chart left, right, up or down, zoom in or out, and more.
6. Move the cursor anywhere on the chart and click. The chart enlarges each time you click on it until it fills the page. When you click on a full-page display, it reduces to display the entire chart as it will print. You can also use the **Zoom In** and **Zoom Out** buttons.
7. Click **Print** to print the chart. If you have **Print Wizard** selected in **Print Options**, this button opens the Print Wizard. If you do not have the wizard selected, this button opens your system *Print* dialog.

   Or, you can close the *Print Preview* without printing the chart by clicking **Close** or **Esc**.

Moving the Chart in Print Preview

In OrgPublisher, the Print Preview for Wall Style dialog enables you to modify your chart for printing by moving the chart left, right, up or down on the printed page.

1. Open the *Print Preview* by selecting **File** from the menu then **Print preview** from the options list. You can also click the Print Preview  button in the toolbar. The *Print Preview Type* dialog opens.
2. Select the **Wall chart preview** radio button and click **OK**. The *Print Preview* dialog opens.

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3. To move the chart on the page, click one of the Move buttons in the toolbar. Click the Move button as many times as needed to move the chart to the location on the page that you want.

Button	Action
	Click this button to move the entire Chart View to the left.
	Click this button to move the entire *Chart View* to the right.
	Click this button to move the entire *Chart View* up.
	Click this button to move the entire *Chart View* down.

You can reverse changes by clicking the Undo  button.

4. Select **Print** if you want to open the Print Wizard to print the chart or **Close** Print Preview without printing.

Opening Print Header/Footer Options in Print Preview

In OrgPublisher the *Print Preview for Wall Style* dialog enables you to modify your chart for printing by opening the *Print Header/Footer Options* dialog to modify your header and footer information.

1. Open Print Preview by selecting File from the Main menu then Print Preview from the pull-down menu. The Print Preview dialog opens and the chart displays as it will print. You can also click on the Print Preview button in the toolbar to open the Print Preview.
2. To open the Print Header/Footer Options dialog, click the Header/Footer  button in the toolbar.
3. Select the header or footer options you want in your printed chart and click Apply to accept the changes and continue working in the dialog or click OK to accept the changes and close the dialog.
4. Select Print if you want to open the *Print Wizard* to print the chart or Close Print Preview without printing.

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Print Charts and Views

After you have modified your chart so you know the printed page will be formatted and aligned correctly, you can print your chart in either Book Style or Chart Style.

You can print views that display specific information shown in your chart, and you can customize your chart headers and footers.

Topics Pertaining to this Section	
Charts	**Headers/Footers**
Printing the Cross Browser Chart	Customizing Header/Footer Print Options
Printing Graphs	Selecting Header/Footer Options
Printing a Chart Legend	**Views**
Printing a Chart without the Print Wizard	Printing a Workforce Analysis Graph
Printing a Wall Style Chart	Printing the List View
Printing Your Chart as a Book	Printing the Profile View
Printing the Published EChart as a PDF	Printing the Summary View
Running Print Setup	Printing the 9 Box Matrix View

Print Charts

Printing the Published Cross Browser Chart

If enabled by the chart administrator, you can print your published cross browser/Silverlight chart in wall style (one displayed page at a time).

1. Click the Print button  . The button may be visible on the toolbar; if not, click 

and select the **Print this page** option from the drop list.

   The *Print this page of the Org Chart* dialog opens.


Print this page of the Org Chart
Set orientation to Landscape to maximize print area.
Shrink to Fit
Content may be truncated if checked off
Print
Cancel

Figure 200.

2. Accept the default of **Shrink to Fit** (recommended) or clear the check box.
3. Click **Print** to print the displayed levels in the chart view.

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Printing Graphs

You can print graphs when the Print Wizard is enabled. To print a graph,

1. Open the Summary View and select the *Graph View*.
2. Click the Print button  in the toolbar. The *Print Wizard* opens.
3. In the **View to print** list, select **Summary View**. Click **Next**.
4. Select **Wall Chart** or **Book Style**. Click **Finish**.

   Each graph prints one to a page.

Printing a Chart Legend

If you use several group or custom icons in your chart, you can choose to print a chart legend when you print your chart using the Print Wizard or the Print Preview. The chart legend does not display in the Book Style Print Preview. It does, however, print.

> **Note:** Chart legends can be activated when still empty, but the legend will not display in the chart until icons have been entered.

1. Open the *Print Wizard* by clicking on the Print button  or, if you have turned off the **Print Wizard** option, select **File** from the main menu, then **Print Options** from the pull-down list and **Use Print Wizard** from the options list.
2. Follow the wizard dialogs to print either in Wall chart or Book style.
3. The last dialog enables you to choose header or footer options. If you select the **Include Legend** check box, your printed chart includes the legend on each page of your chart.
4. Click **Finish** to close the wizard and print your chart.
5. If you are using the *Print Preview* option and you have defined and enabled a legend,

   you can use the Add or remove legend button  in the preview and select the **Include Legend** check box in the *Settings* dialog of the *Book style preview*.

   The legend prints on one page in Wall style and on every page in Book style. You may need to make adjustments in your chart for the size of the legend so that it does not print over boxes.

   > **Note:** Depending on where you place the legend, some boxes in the chart may be covered. You may want to modify the legend settings to better fit the legend within a blank area of the Chart View.

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Printing a Chart without the Print Wizard

You can print a chart from the menu options to print the Wall chart style as long as you have disabled the Print Wizard.

> **Note:** If you choose to turn off the Print Wizard, the Book Style print option is no longer available.

1. Open the chart you want to print. If your chart has multiple styles, select the one you want to print.
2. Open the Print Preview by selecting **File** from the Main menu then **Print preview** from the options list. The *Print Preview Type* dialog opens. You can also click the Print Preview button  in the toolbar.
3. Click **OK** to accept the default Wall chart preview type or select the **Book style preview** radio button. The *Print Preview* dialog opens.
4. To reduce the size of a chart that does not fit on a page, you can reduce the size of chart text, change the arrangement of chart boxes, reduce the space between boxes, or select **View**.
5. Click on the Print button  in the toolbar. The system *Print* dialog opens with the default printer and settings. Your dialog options may vary.
6. Verify the selected printer, or select a different printer.
7. Specify a range of pages, or select **All** to print the entire document.
8. Specify the number of copies to print. Click **OK** to print the chart.

Printing in Wall Chart Style

The Wall Chart Style printing option is available from the Print Wizard or the *Wall Chart Print Preview*. This procedure describes printing your chart using the *Print Wizard*. If you want to modify your Wall chart in more detail, see the Previewing a Wall Style Chart procedure.

Buttons on the toolbar enable moving boxes, changing box layouts, and switching between zoom and grab modes. When in grab mode, clicking on boxes selects the box rather than zooming in/out.

1. Open the Print Wizard or, if you have turned off the **Print Wizard** option, select **File** from the main menu, then **Print** from the pull-down list. You can also click the Print button  in the main menu.
2. If you selected **File** then **Print**, the system Print dialog opens. Verify the printer options and click **OK**. The portion of the chart displayed in the Chart View prints.

   If you are following the *Print Wizard*, and additional views are displayed in your chart, you can select the views you want to print. Click **Next**.
3. Following the *Print Wizard*, select the **Wall Chart** radio button. Click **Next**.
4. Select the **Include Legend** check box if you are using group or custom item icons in your chart and need the chart legend to identify them.

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5. Click **Header/Footer** if you want to include these in your chart. The *Print Header/Footer Options* dialog opens.
6. The **Header** tab prompts you to indicate if you want to print a page header. Select chart title options and the date and time formats.

   If you select the **Group label** check box, the name of the group prints in the upper-left corner of the page.
7. The **Footer** tab prompts you to indicate if you want to print a page footer. Select the fields you want to see in the footer.

   See the Selecting Print Header/Footer Options procedure for detailed header and footer information. In addition, see the Customizing the Header and Footer Print Options procedure for information on formatting fonts.
8. When you have made your header and footer selections, click **Apply** to accept the changes and continue using the dialog or click **OK** to accept the changes and return to the *Print Wizard*.
9. Click **Finish** to print your chart.

Printing the Published EChart as PDF

When the published EChart is opened and the Send to PDF button displays in the toolbar, you can print the chart as PDF.



Figure 201.

1. Click the Send to PDF button to create a PDF of the chart.

   A dialog opens that allows you to select the **Number of OrgChart** levels to print.

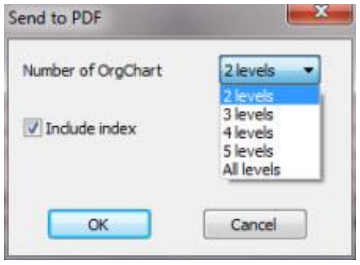


Figure 202.

2. In addition, you can choose whether or not to **Include index**, a version of the List View.
3. Click **OK** when you have made your selections. A *File Download* dialog opens.

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You can **Open** the PDF immediately or **Save** the document to a folder of your choice.

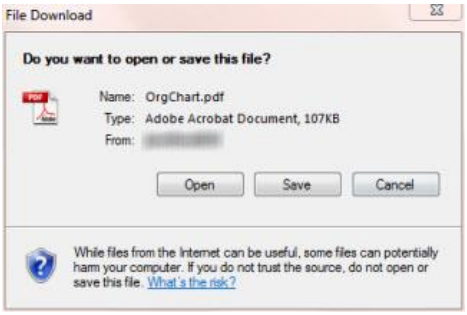
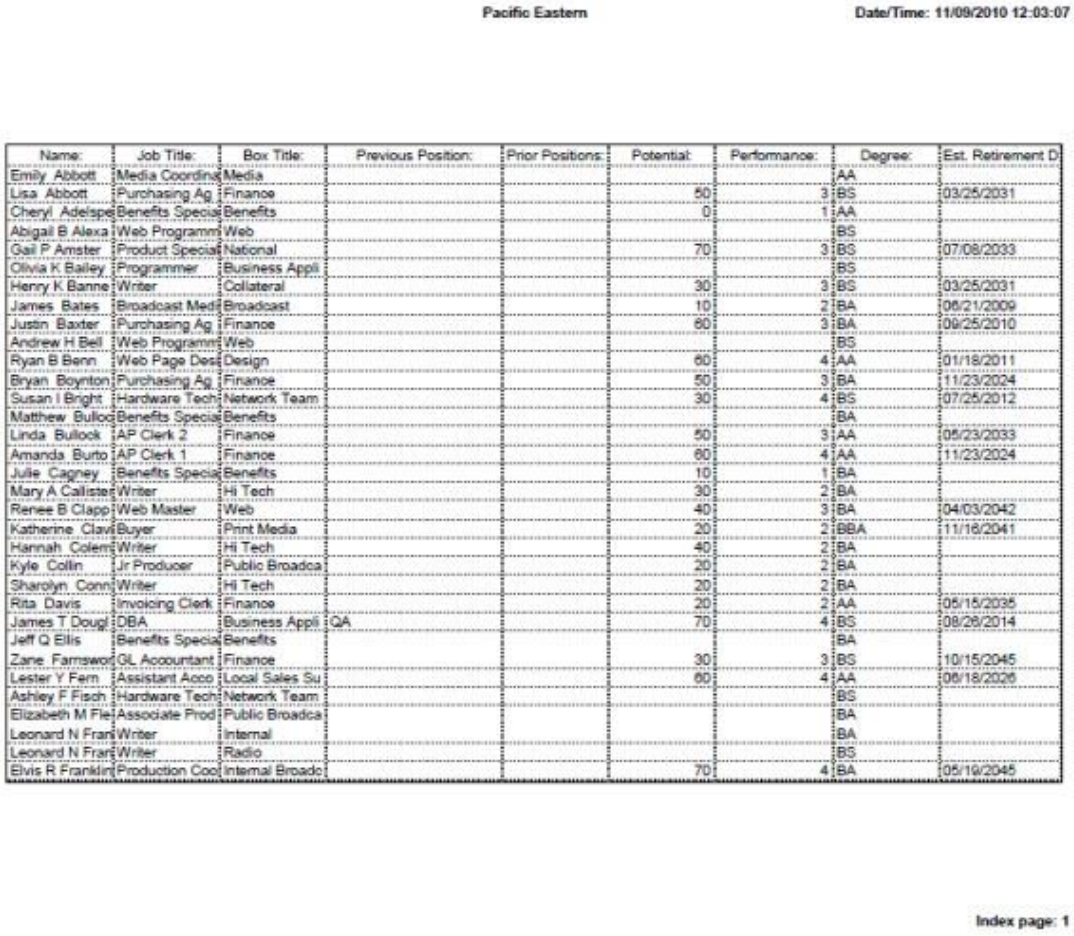

File Download
Do you want to open or save this file?
Name: OrgChart.pdf
Type: Adobe Acrobat Document, 107KB
From:
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Figure 203.

When you open the PDF, the index is at the beginning of the document.


Pacific Eastern Date/Time: 11/09/2010 12:03:07

Name:	Job Title:	Box Title:	Previous Position:	Prior Positions:	Potential:	Performance:	Degree:	Est. Retirement D
Emily Abbott	Media Coordina	Media					AA	
Lisa Abbott	Purchasing Ag	Finance			50	3	BS	03/25/2031
Cheryl Adelspe	Benefits Specia	Benefits			0	1	AA	
Abigail B Alexa	Web Programm	Web					BS	
Gail P Amster	Product Special	National			70	3	BS	07/08/2033
Olivia K Bailey	Programmer	Business Appli					BS	
Henry K Banne	Writer	Collateral			30	3	BS	03/25/2031
James Bates	Broadcast Medi	Broadcast			10	2	BA	06/21/2009
Justin Baxter	Purchasing Ag	Finance			60	3	BA	09/25/2010
Andrew H Bell	Web Programm	Web					BS	
Ryan B Benn	Web Page Desi	Design			60	4	AA	01/18/2011
Bryan Boynton	Purchasing Ag	Finance			50	3	BA	11/23/2024
Susan I Bright	Hardware Tech	Network Team			30	4	BS	07/25/2012
Matthew Bullod	Benefits Specia	Benefits					BA	
Linda Bullock	AP Clerk 2	Finance			50	3	AA	05/23/2033
Amanda Burto	AP Clerk 1	Finance			60	4	AA	11/23/2024
Julie Cagney	Benefits Specia	Benefits			10	1	BA	
Mary A Callister	Writer	Hi Tech			30	2	BA	
Renee B Clapp	Web Master	Web			40	3	BA	04/03/2042
Katherine Clavi	Buyer	Print Media			20	2	BBA	11/16/2041
Hannah Colem	Writer	Hi Tech			40	2	BA	
Kyle Collin	Jr Producer	Public Broadca			20	2	BA	
Sharolyn Conn	Writer	Hi Tech			20	2	BA	
Rita Davis	Invoicing Clerk	Finance			20	2	AA	05/15/2035
James T Dougl	DBA	Business Appli	QA		70	4	BS	08/26/2014
Jeff Q Ellis	Benefits Specia	Benefits					BA	
Zane Farnswor	GL Accountant	Finance			30	3	BS	10/15/2045
Lester Y Fern	Assistant Acco	Local Sales Su			60	4	AA	06/18/2026
Ashley F Fisch	Hardware Tech	Network Team					BS	
Elizabeth M Fle	Associate Prod	Public Broadca					BA	
Leonard N Fran	Writer	Internal					BA	
Leonard N Fran	Writer	Radio					BS	
Elvis R Franklin	Production Coo	Internal Broado			70	4	BA	05/19/2045

Index page: 1

Figure 204.

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The printed chart follows, displays as many levels as you selected.

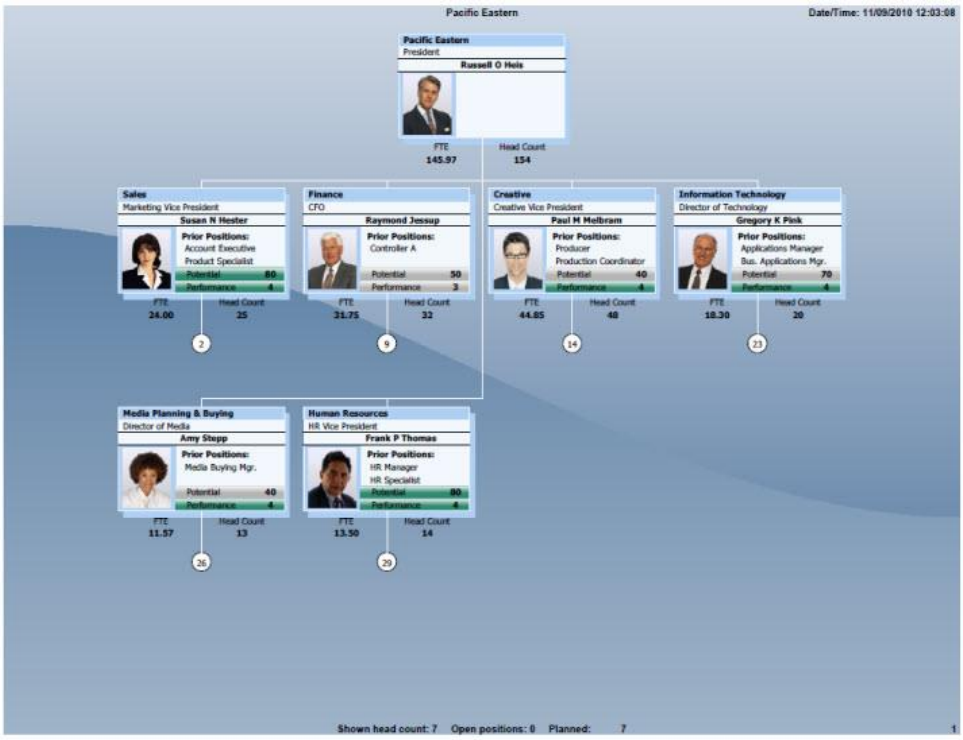


Figure 205.

Printing Your Chart as a Book

The Book Style printing option is available from the Print Wizard or the *Book Style Print Preview*. If you want to modify your Book Style chart in more detail, see the Previewing a Book Style Chart procedure.

Book Style is a method of previewing or printing your chart as a single print job and is sent to a PDF file. You can include an index, print all or just selected pages, change the layout, or modify box settings.

1. Verify that your **Print Options** choice is set to **Print Wizard**.
2. Select **File** from the menu bar, then **Print** from the pull-down menu. You can also click the Print button in the main menu. The *Print Wizard* opens.
3. If additional views are displayed in your chart, you can select the views you want to print. Click **Next**.
4. Select the **Book Style** radio button and click **Next**.
5. The *Settings* dialog of the *Print Wizard* provides several options to choose from when printing your chart as a book. Select the **Use classic book style printing** radio button if you want to print all pages using chart layout 4.

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Use the page optimizer

If you select **Use the optimizer** for printing your chart as a book, you can accept automatic optimizer settings or customize the settings.

Setting	Description
Use easy settings	Select this radio button to use the slider to print your chart on **More pages** or **Fewer pages**. OrgPublisher automatically arranges the chart to best fit the boxes on the pages.
Preferred layout	Choose the radio button to print your chart pages in one of the layout options shown.
Use custom optimizer settings	Select this radio button to override the default settings and print your chart as a book using selected settings.
Custom settings	Click this button to open the *Advanced Page Optimizer Settings* dialog. In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the *Advanced Page Optimizer Settings* dialog, selecting the maximum number of reporting boxes and the layout to display per page. When a page fits none of the criteria selected in the *Advanced Settings* dialog, OrgPublisher prints the chart using layout 4 with two levels displayed.
Page customization list	Select this option to view a list of boxes that you have either customized within the *Print Preview* window, or have chosen to print at the top of each page of your book style chart. In order to print a box at the top of a page, you must first select the box for this purpose in the Chart View, by right-clicking on a box and selecting **Top of Page**.

1. Select the **Use easy settings** radio button and use the slider to enable OrgPublisher to print on more or fewer pages. If you choose **More pages**, OrgPublisher prints fewer boxes on a page. If you choose to **Fewer pages**, OrgPublisher fits as many boxes on a page as possible.
2. Using the standard settings, select a **Preferred layout** to print your chart pages.
3. If applicable, select the **Use custom optimizer settings** radio button and click **Custom settings** to open the *Advanced Page Optimizer Settings* dialog.

   In some cases, the default criteria used by the page optimizer may not produce the fewest pages possible for printing your Book Style chart. You can adjust those settings using the *Advanced Page Optimizer Settings* dialog, selecting the maximum number of reporting boxes and the layout to display per page.

   When a page fits none of the criteria selected in the **Custom Settings**, OrgPublisher prints the chart using layout 4 with two levels displayed.
4. Set a maximum number of report boxes and select a layout and the number of levels to print on a page in order to print your chart on as few pages as possible. Click **OK**.
5. If you have already previewed your chart and selected boxes to print at the top of each page, select Page customization list in order to delete any as a top of page box. Deleting the box from this list does not remove the box from the chart. Click **OK**.

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Boxes across on book style pages

You can allow OrgPublisher to determine the chart row size or manually select the number of boxes in a row.

Setting	Description
Automatically set row size	Select this radio button to let OrgPublisher set the number of boxes per row and size these boxes to fit each page.
Specify maximum row size	Select this radio button to manually set the maximum number of boxes to be printed in a row. The minimum number of boxes across is 4. (The chart style is automatically stacked, which means there are two levels of the organization per page and the lowest level is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level.)

Organizational levels to print

Accept the default to show all levels in the printed chart or select a specific level option.

Setting	Description
Show all levels	Accept this default or click the down-arrow to choose the number of levels you want to print.

1. Choose Print index to print an index of pages to accompany your book print.
2. If you are not already using the **Book Style Print Preview**, select the **Show the print preview** check box in order to view each page before you print the chart.
3. If applicable, select the **Show page number circles** radio button.
4. If you want OrgPublisher to adjust the size of the boxes to fit on each page, select the **Zoom each page to fit** radio button. Click **Next**.
5. If you are using the *Settings* dialog from the Book Style Print Preview window, click Header/Footer to change either the header or footer text. The **Print Header/Footer Options** dialog displays. Follow the prompts to select header and footer options.
6. If you have included groups or custom colors in your chart, you can choose **Print legend** to print a chart legend that helps identify the icons displayed in the chart boxes.
7. Click **OK** to accept the changes and close the dialog.
8. If you are using the *Settings* dialog while publishing to PDF, you can choose to print a header and footer on each page, or clear the **Print Header** and **Print Footer** check boxes if you do not want them to print in the book pages.
9. Click **Finish** to start the printing process. The *Book Style Print Preview* dialog opens. Make any adjustments using the *Print Preview*.
10. When you are ready, click **Print**. Your system *Print* dialog box displays. Verify your printer settings and click **OK**. Your chart begins to print as a book.

    Your printed Book Style chart contains **Next** and **Previous** page indicators, and prints the *List View* as an index at the beginning of the chart.

    The index contains the page numbers of the chart where employees are located and the custom fields associated with each position.

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Running Print Setup

To select your printer, page size, page orientation, and paper source before you print a chart:

1. Select **File** from the Main menu then **Print Setup** from the options list. You can also click the Print Setup button in the toolbar. The *Print Setup* dialog opens with the default printer and settings.
2. Verify the selected printer, or select a different printer.
3. Verify the paper size or select a different size.
4. Verify the paper source or select a different source.
5. Select portrait or landscape orientation.
6. Click **OK** to save these settings as defaults.

Print Headers and Footers

Selecting Print Header/Footer Options

1. Select **File** from the Main menu then **Print** from the pull-down menu. The print options display in the **View to print** list.
2. Click one of the views to print. Available views depend on which views you have open in your chart. Click **Next**.
3. Select either the **Wall Chart** or **Book Style** radio button for the type of print you want.
4. Click the Header/Footer button. The *Print Header/Footer Options* dialog opens.

Header tab

Field	Description
Print Page Header	Select this check box to print a header in your chart.
Group label	Select this check box to print the group name in OrgPublisher and PluginX.
Title	Select this check box to print a title for the chart.
Default Chart Title	Select this radio button to use the title shown on the chart.
Custom Title	Select this radio button in the Print to type new title text box.
Date and Time	Select this check box to show the date and time the chart was printed.
Date Format	Select the format to display the date and time, such as MM/DD/YYYY HH:mm:ss.
Date Prefix	Type text to precede the date or date and time on your chart, if any.
Print Date	Select this radio button to print the date that the chart is printed.
Data Modified Date	Select this radio button to print the date that the chart was last modified.
Font Customization	This section of the *Print Header/Footer Options* dialog displays a sample of the selected font and a button, **Select Font**, to open the *Font* dialog to customize font information for the header or footer.

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Footer tab

Field	Description
Print Page Footer	Select this check box to print a footer in your chart.
File Name and Location	Select this check box to print the drive and directory where the chart file is located, followed by the file name.
Head count	Select this check box to print the actual head count for the chart or the displayed portion of the chart.
Open positions	Select this check box to print the head count for positions that are listed in your chart but are not filled.
Page Number	Select this check box to print the page number on each page of the chart.
Planned Head count	Select this check box to print the total of actual and planned positions in your chart.
Custom Footer	
Font Customization	This section of the *Print Header/Footer Options* dialog displays a sample of the selected font and a button, **Select Font**, to open the *Font* dialog to customize font information for the header or footer.

5. Select the header or footer options you want and choose a date format. Click **OK** to accept the changes and close the dialog.
6. Click on Print Wizard if you want to open it each time you print a chart. The options to print the chart as a book or wall chart are only available in the *Print Wizard*.

   You can also select these options when using the Book style and Wall chart style print preview.

Customizing the Header and Footer Print Options

The header/footer print option enables you to display a group label, modify the chart title and date printed in the header, as well as select data to display in the footer such as head count, number of open positions, and the file name and location. You can also customize font information, such as type, size and color, for both header and footer in a printed OrgPublisher chart. Customized footers print above any other existing footer information.

1. Access the *Print Header/Footer Options* dialog by either using the *Print Wizard*, while you're working with the Print Preview, or by selecting **File** from the Main menu, **Print Options** from the pull-down menu, and **Header** or **Footer** from the options list.
2. Follow the Selecting Print Header/Footer Options to make your selections in both the **Header** and **Footer** tabs, such as **Date Format**, **Group label**, or **Head count**, that you want to print.
3. In the field beneath the **Custom Header**/**Custom Footer** check box, type what you want to appear in the header or footer, such as a title, date, or other text.
4. Us the **Font Customization** section, for additional customization in both tabs. You can change the font for either the header or footer, or both. Click **Select Font**. The *Font* dialog opens.
5. Select the **Font**, **Font style**, and **Size** for your text. Your selection displays in the **Sample** pane of the dialog.
6. You can also choose **Effects**, such as **Underline** or **Color**.
7. When you have made your selections, click **OK** to accept your changes and close the *Font* dialog.

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Print Views

You can print views that display specific information about your chart. For example, the Summary View displays the summary fields you have set up by each position type. A print preview is available only for the Chart View. Each view must be open in order to print it.

1. Select **File** from the Main menu then **Print** from the pull-down list. The *Print Wizard* opens. The listed views reflect those displayed in your chart.
2. Select the view you want to print. By default, **Org Chart** is already selected to print the *Chart View*. You can make only one selection. Click **Next**.
3. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**.
4. If applicable, set the Header/Footer options.
5. If applicable, select the **Include Legend** check box.
6. Click **Finish** to print the view.

Printing a Workforce Analysis Graph

Graphs are available for printing when the *Print Wizard* is enabled. Each graph will print one to a page.

1. Open your chart then open the *Summary View* by selecting **View** in the Main menu and **Summary View** from the options list. You can also click the Summary View button in the Views toolbar.
2. Select the **Graphs** tab to display the graph in your chart.
3. Click the Print button in the Main toolbar. The Print Wizard opens. If you have more than one graph, each graph prints one to a page.
4. Select **Summary View** and click **Next**.
5. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**.
6. If applicable, set the Header/Footer options.
7. If applicable, select the **Include Legend** check box.
8. Click **Finish** to print the graph. The printed graph displays whatever is shown in the Graphs tab, such as a legend or categories.

Printing the List View

You may want to print the List View as your telephone listing or, depending on the custom field data that you have added, as a convenient data index.

Note: Because of a published EChart size, the Print List is available only for the List currently displayed on the view. You can, however, select the Everyone group, copy the list to the clipboard, paste the list into another application and print it.

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1. Open your chart then open the *List View* by selecting **View** in the Main menu then **List View** in the options list.

   You can also click the List View button in the Views toolbar.
2. Click the Print button in the toolbar. The *Print Wizard* opens.
3. Select **List View** and click **Next**.
4. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**.
5. If applicable, set the Header/Footer options.
6. If applicable, select the **Include Legend** check box.
7. Click **Finish** to print the view.

Printing the Profile View

You may choose to print the Profile View of an individual, for instance, to place a hard copy of the employee profile information in the employee file. You can print the *Profile View* using the Print button, as described here, or the Print Wizard. You can print side-by-side profiles in this view.

1. Open the *Profile View* by selecting **View** in the Main menu then **Profile View** in the options list. You can also click on the Profile View button in the Views toolbar.
2. Select **Profile View** and click **Next**.
3. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**.
4. If applicable, set the Header/Footer options.
5. If applicable, select the **Include Legend** check box.
6. Click **Finish** to print the view.

Printing the Summary View

You can print the *Summary View* using the Print button, as described here, or the *Print Wizard*.

Note: The Summary View is not available in a published real-time chart.

1. Select File from the Main menu then Print Options from the pull-down menu.
2. Select **Summary View** and click **Next**.
3. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**.
4. If applicable, set the Header/Footer options.
5. If applicable, select the **Include Legend** check box.
6. Click **Finish** to print the view.

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Printing the 9 Box Matrix

You can print the 9 Box Matrix if the Print Wizard has been activated. If the *9 Box Matrix* is maximized in OrgPublisher, the matrix prints automatically.

> **Note:** Records displayed in the 9 Box Matrix are associated with the level displayed in the Chart View.

1. Open the *9 Box Matrix* by selecting **View** in the Main menu then **9 Box Matrix** from the options list. You can also click the 9 Box Matrix button in the Views toolbar.
2. Click the Print button in the Main toolbar. The *Print Wizard* opens.
3. Select 9 Box Matrix and click Next.
4. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**.
5. If applicable, set the Header/Footer options.
6. If applicable, select the **Include Legend** check box.
7. Click **Finish** to print the view. The printed *9 Box Matrix* includes the designations for each box, such as High Performance/High Potential or Average Performance/Low Potential.

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Work with Published Charts

The features available in each published chart depend upon the publishing format option selected.

General Chart Activities

Many tasks listed here are also applicable to Organizational and Succession planning charts.

Topics Pertaining to this Section	
Accessing Smart Links	Setting Top of Chart
Adjusting Column and Row Widths	Sorting the List View
Copying a Hyperlink to a Person in the Chart	Understanding Profile View Subheadings
Copying a Workforce Analysis Graph	Understanding the Chart Legend
Copying the List View	Using Chart Action Buttons
Copying the Summary View	Using Click and Drag Scrolling
Embedding Org Charts	Using Dynamic Chart Layouts
Going to the Top of the Displayed Chart	Using OrgPublisher in Accessibility Mode
Locating Information with the List View	Using the Bulk Editor in Custom Fields Dialog
Locating Information with the Tree View	Using the Bulk Editor Option in Profile View
Maximizing Docked Views	Using the Symbol Indicators in the Tree View
Opening a Password Protected Chart	Viewing the Tabbed Hover Profile
Opening and Pinning the Style View	Viewing the Tabbed Profile View
Maximized and Restoring Docked Views	Using the Tabbed Style Selector
Moving Boxes in the Published Chart	Viewing a Chain of Command
Selecting a User ID Instance	Viewing Information in the Profile View
Selecting Drilling Options	Viewing the Hover Profile
Sending the Chart to Microsoft PowerPoint	Viewing the Matrix Reporting Hover Display

Adjusting Column and Row Widths

1. To resize a column or row width in the List View, Profile View, Summary View, or Tree View, place the cursor in the column or row heading on the line separating one column or row from the next.
2. Click and hold down the left mouse button. The cursor changes appearance.
3. Drag the column or row line to the width you want and release the mouse button. The column or row is resized.

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Locating Information with the List View

- To use the List View to locate information in the chart, click on the name, position or custom field in the *List View* that you want to find. The chart re-centers, and the matching record is highlighted in the chart.
- To use the Chart View to locate information in the *List View*, click on the name, position, or field in the chart. The matching record is highlighted in the *List View*.

Locating Information with the Tree View

You can use the *Tree View* to locate information in the *Chart View*, or to view chart information in an outline format.

1. If not already open, click the Tree View button  in the toolbar. The *Tree View* opens on the right-hand side of the chart window.
2. In the *Tree View*, select the person, job, or custom field you want to find in the chart.
3. Click on that person, job, or custom field.
4. The chart re-centers and the matching record is outlined in red in the *Chart View*.

Maximizing and Restoring Docked Views

1. Open the view, if enabled by your chart administrator, you want to maximize.
2. Click the Maximize button, typically in the upper right or upper left corner of the view. The view increases in size to fill the screen.
3. Click the contract maximized view button or the Restore button  , typically in the upper right or upper left corner of the view, to set the view to its previous size.

Moving Boxes in the Published Chart

If given permission to access specific boxes, end users can move the boxes in the published chart. The mouse move box feature changes only if the user has the necessary permissions to access the box.

1. Place the mouse cursor over the border of a box. The cursor changes into a four way arrow  .
2. Click the mouse, and drag the box from that point.
3. Release the mouse when you reach the new location for the box.

Opening a Password Protected PluginX Chart

In order to protect sensitive information, you can publish charts to your browser as password protected. End users must enter a valid password in order to view the chart.

1. The *Enter Password* dialog opens when you access a protected chart in your browser.
2. If you know the password to open the chart, type the password in the **Password** field.

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3. If the **Remember my password** option displays and you want to open the protected file in the future without entering the password again, select this check box.
4. Click **Unlock** to open the chart.
5. If you do not have a password, click **Cancel** and contact the publisher of the chart you want to open.

Selecting a User ID Instance

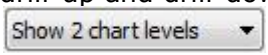
When opening a secured EChart, there may be multiple occurrences of end user ID records, for instance if they have more than one report-to in the chart. When this occurs, end users can select a user ID instance to use in the chart session. EChart security must be enabled for this feature to work.

1. Open the published secured EChart. The *Select User Instance* dialog opens. Fields displayed include **Reports to**, **First name**, **Last name**, **Job title**, **Box Title**, **Position type**, and **Reporting relationship** (direct or indirect).
2. Review the displayed fields and select your record for the current chart session.
3. If you are opening a rich client chart, click **OK** to close the dialog. The published EChart opens.

   If you are opening a thin client chart, the EChart opens when you click your selection.

Selecting Drilling Options in the Published Chart

If enabled by your administrator, you can move up or down in the *Chart View* based on a specific hierarchical tree with these buttons. A button containing an arrow pointing downward moves down through the chart. If there are tiers of the chart above the viewed area, an arrow pointing upward moves toward the top.

1. To use drill-up and drill-down custom levels, first set the number of custom levels to display 

.
2. Click on the Drill-up/drill-down button  to turn this feature on or off.
3. Scroll through the chart until you see the drill-down arrow  .
4. Click on the arrow to move down the chart.
5. Click on the arrow pointing upward  to move back up the chart.

Other ways to navigate around a chart are:

- Find Next 

- Top of Chart 
- List View 
- Search 

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- Scrolling 

Sorting the List View

1. Open the List View by clicking the List View button  in the toolbar.
2. Click on the column heading that you want to sort by. The sort order is retained when you publish the chart. For instance, click on the full name to sort the list alphabetically by last name.
3. Click on the heading for a numeric field, such as telephone number, to sort the list numerically, or on a date column to sort the list by date. The date format must be **YYYY/MM/DD**.

   In addition, the Search View is available within the *List View* and offers features much like the *Search* dialog. Columns shown in the *List View* determine the columns shown in the *Search View*.

Understanding Profile View Subheadings

Depending on your chart administrator, you may see subheadings in the Profile View. Subheadings help organize data fields for better viewing and understanding.

- Open the *Profile View*, if available, in your chart.



Figure 206.

The *Profile View* displays subheadings, indented one space, with corresponding fields indented two spaces and listed beneath the subheadings. Subheadings group information of the same type for a quicker grasp of available data.

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Understanding the Chart Legend

The Chart Legend tells you what the icons and colors used in the chart mean, and it takes the place of OrgPublisher's previous group legend.



Figure 207.

Each icon is accompanied by the name of the associated group. Custom colors contain a label describing how they are used in the chart.

Using Chart Action Buttons

Chart action buttons are an easy way to view and access what were previously the right-click menus for each data field in the Chart View. The chart administrator chooses the Action button options for published charts.

This feature is available in the OrgPublisher application and in charts published as PluginX or EChart rich client, as well as planning charts.

1. Open the chart and select a data field in a chart box, for instance the job title. The Action button appears to the right of the chart box.

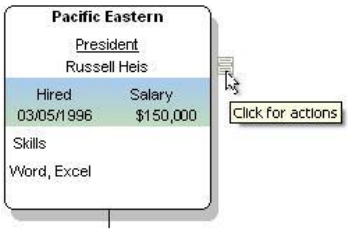


Figure 208.

2. Click the button. The available menu options appear.

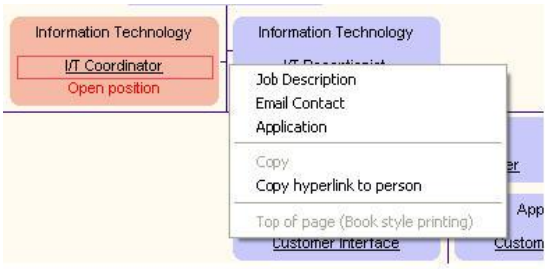


Figure 209.

In this example, the data includes Smart Links associated with the data field. Smart Links display at the top of the Action menu list.

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Note: Microsoft® Internet Explorer will append the OrgPublisher menu list with Internet Explorer specific options, such as "Right to left Reading order" or "Insert Unicode control character." These additional menu options cannot be disabled in the browser.

3. Select the option you want to use and proceed with your task. If you choose not to select a menu option, click in a blank area of the chart to close the menu.

   Chart action buttons include more options when used by the chart administrator within OrgPublisher. The following graphic is of the same box and job title from the chart administrator's perspective.

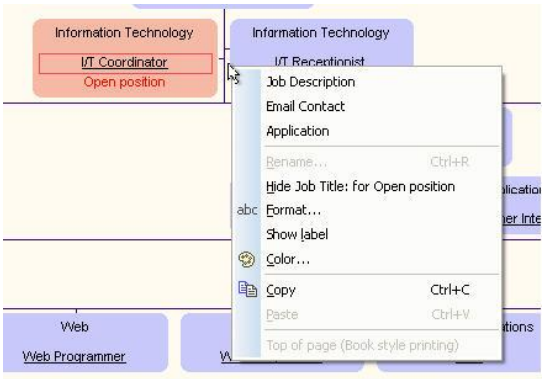


Figure 210.

Using Dynamic Chart Layouts

OrgPublisher allows you to dynamically select a chart layout.

1. Open a chart and click the Select the layout style for this chart button  .



Figure 211.

2. The drop-down list displays layout options. The current layout is selected. Click the layout structure you want to use in the chart.

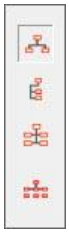


Figure 212.

The chart immediately changes the displayed layout.

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Using OrgPublisher in Accessibility Mode

The OrgPublisher PluginX chart can be accessed by JAWS® for Windows screen reading software for the blind and visually impaired.

The following functions are supported in the PluginX chart via the keyboard.

Functions	Keyboard command	Description
Find	**F key**	Opens the *Enter Search text* dialog. This is equivalent to an All fields search; for example, type a first or last name, or a job or box title. Press the space bar or **Enter** to begin the find, or press **TAB** to the **Cancel** button.
Find Next	**N key**	Performs a "find next" matching record function if a previous search occurred.
Zoom in	**Crtl+**	Raises the zoom factor by one level.
Zoom out	**Ctrl -**	Lowers the zoom factor by one level.

Note: JAWS hot keys, such as F for the next form field and L for the next list, are disabled. OrgPublisher PluginX accessible charts do not contain form fields, lists, links or tables. If you use a high zoom-in level, you may notice JAWS takes a little longer to read the screen.

You can navigate through the chart using the **Up**, **Down**, **Left**, and **Right** arrow keys on your keyboard. The Drill-up/Drill-down to another level function occurs automatically.

- When a chart is opened, the top box is automatically selected.
- A box must always be selected. Drilling on "white space" will not clear the current box.
- Only one box is selectable at a time. Hierarchical "trees" are not available.
- To access a sibling of a selected top box with a drill-up button, click the up arrow first, then the left or right arrow. If the requested sibling does not exist, the original box will remain selected.
- If JAWS is running and you tab away to another application, the focus on the chart may be lost. To regain focus, press **Alt TAB** to go to another application and then press Alt TAB again to refocus on the chart.

Using the Symbol Indicators in the Tree View

- If enabled by your administrator, you can use the Tree View to locate information in the Chart View, or to view chart information in an outline format.
- Open the *Tree View* by clicking the Tree View button  in the toolbar. The Tree View opens on the right-hand side of the chart window.
- Symbols used in the *Tree View*, their function, and locations are:

Symbol	Function	Location on the Tree
+	A component is collapsed and can be expanded to show more components by clicking on the plus sign.	Corner of the branch connected to the chart component
-	A component is expanded and can be collapsed by clicking on the minus sign.	Corner of the branch connected to the chart component
>	More boxes are available for display by double-clicking the box containing the greater-than sign.	Chart box

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Viewing a Chain of Command

The *Chain of Command* mode is available in the published chart using PluginX or EChart, including the published planning-enabled chart. It is *not available* in the modeling or succession planning published charts, as these charts are about reassigning responsibilities and positions.

1. Select the chart box containing the person whose chain of command you want to see.



Figure 213.

2. The Display Chain of Command button is enabled in the Main toolbar. Click it to view the person's chain of command, the reporting hierarchy upward from this person in the chart.

   The Chart View changes to display the selected person's chain of command from the selected box to the top of the chart.

   Note: This view is affected by the number of levels shown. If the chain of command spans 3 levels, but the chart is set to display only two, just the first two levels in the chain of command are shown.

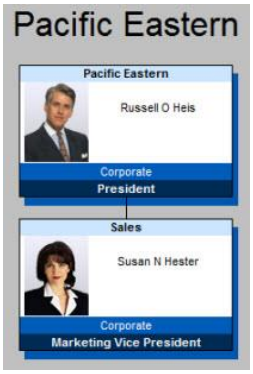


Figure 214.

3. Click the button again to re-display the whole chart.

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If the List View is open, the list changes to reflect the people in the boxes now displayed.



Figure 215.

If the Profile View is open, it displays the person at top of the chart.

Viewing Information in the Profile View

If enabled by your supervisor, the *Profile View* displays additional information for a selected chart box, job, or person.

1. Open the *Profile View* in the chart by clicking the Profile button  .
2. Click on a name in the *Chart View*.



Figure 216.

3. The *Profile View* displays information associated with the selected name.
4. Click the Profile View button  again to close the view.

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Viewing the Tabbed Profile View

The tabbed *Profile View* opens with custom fields grouped under named subheadings in tab options. For instance, click a tab to view information about the person, job, or department.



Figure 217.

Searching and Groups in Published Charts

Users of a published chart can perform many of the tasks available in the OrgPublisher application. Some of these tasks are determined by the choices made by the chart administrator while publishing a chart.

End users can create and modify their own groups, but cannot alter groups created in the original chart. Tasks listed here are also applicable to Organizational and Succession planning charts.

Topics Pertaining to this Section	
Adding a New Group to the My groups tab	Opening a Selected Group in the Chart View
Adding a Person to a Group in the My groups Tab	Removing a Person from a Group in the My Groups Tab
Adding a Group Category	Saving Side By Side Profiles as a Group
Auto Pinning Group or Search Results as Side-by-Side Profiles	Searching Charts
Copying a Group List in the My Groups Tab	Sending Email to a Group in the My groups Tab
Deleting a Group from the My Groups Tab	Spotlighting Search Results or Group in the Chart View
Editing a Group Definition from the My Groups Tab	Using the Smart Search Option
Exporting and Importing Groups from the My Groups Tab	Using the Toolbar Search with Quick Search Results

Adding/Saving a New Group to the My groups tab

You can add a new group to your chart under the **My groups** tab by searching for select criteria and saving the results as a group.

1. Open a published chart in your browser.

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2. Open the List View and select the Search View pane. Three tabs are shown, **Search**, **Groups**, and **My groups**.

   The **Search** tab enables you to search for specific information in the chart. You can copy the results list or save the list as a group.

   The **Groups** tab displays the groups created by the OrgPublisher administrator before publishing the chart.

   The **My groups** tab displays all groups saved by the end user, plus the default **Everyone** group.

3. If you haven't already done so, conduct your search using the **Search View** pane.
4. When your search result is the way you want it, click Save  . The *Enter a group name* dialog opens.
5. Type the name of the group and click **OK**. The **My groups** tab opens and displays the new group name. Several buttons are also available at the top of the tab view.

   The New Group Definition button 

opens the Group Editor dialog to add a new group definition.

   The Delete Group Definition button  deletes a selected group.

   The Edit Group Definition button  opens the *Group Editor* dialog to edit an existing group definition.

   The Export group button  opens the *Select Groups to Export* dialog to send groups to another chart location.

   The Import group button  opens the *Select Groups to Import* dialog to bring groups from another location into this chart.

   Note: If the end user must change PCs, the export and import buttons enable the transfer of end user groups from one machine to another.

6. To display a specific group in the published chart, open the Filter View by clicking on the groups label in the far-left of the Style bar.

Adding a Group Using the Right-click Menu

1. In the Chart View, select the name of the person you want to add to a new group.
2. Right-click on the person's name. The *Select a Group* text box opens.
3. Click **New Group**. The *Enter a group name* text box opens.
4. Type the name for the group. Click **OK**. The text box closes and the new group is created.

   The group name is added to the **My groups** tab and *Filter View* in the chart.

Adding a Person to a Group in the My groups Tab

You can add a person to a group in the **My groups** tab directly from the *Chart View*.

1. In the *Chart View*, select the name of the person you want to add to an existing group.

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2. Right-click on the person's name and select the **Add person to the Group** option. The *Select a Group* text box opens.
3. Click the down-arrow and select a group from the drop-down list.
4. Click **OK**. The text box closes and the person is now included in the selected group.

Exporting and Importing Groups

OrgPublisher includes export and import options for both the OrgPublisher application and the PluginX chart. If duplicate group names are imported, OrgPublisher will append the name with a number, 1, 2, 3, etcetera. No groups are overwritten by the import process.

When exporting groups that reference other groups, verify that they reference the correct group. If a referenced group is not included in the import, the affected group will not be imported and an error message displays.

> **Note:** In order to import a group successfully, the number, type, and order of custom fields in the chart receiving the import must match exactly the number, type, and order of custom fields in the chart from which the groups was exported.
>
> The **Everyone** group cannot be exported or imported.

Export Groups

1. Open the Search View or the Search dialog. Click on the **My groups** tab if you're in a published chart (or the **Groups** tab if you're in the application). The group names display in the upper pane.
2. Click the Export groups button  . The *Select Groups to Export* dialog opens.
3. Click **Select all** if you want to export all of the groups. You can clear groups you do not want to export, or you can click **Clear all** if there are many groups and you want to select just a few.
4. Type or **Browse** to the file into which you want to export your groups, such as a file in your network drive. Type a name for the group files and click **Open**. The file extension is **OCG**, Group Data Files.
5. Click **Export** to send the groups to the selected file. A message displays to let you know if your groups were successfully exported.

Import Groups

1. Open the Search View or Search dialog. Click on the **My groups** tab if you're in a published chart (or the **Groups** tab if you're in the application).
2. Click the Import groups button  . The *Select Groups to Import* dialog opens.
3. Type or **Browse** to the file from which you want to import your groups. The names of the groups in the selected file display.

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4. Click **Select all** to import all of the displayed groups to your PC. You can clear the groups you do not want to import or click **Clear all** if there are many groups and you want to select just a few.
5. Click **Import**. A message displays that your groups have been successfully imported. The selected groups display in the published chart **My groups** tab.

Preview and Print Published Charts

Tasks listed here are also applicable to Organizational and Succession planning charts.

Topics Pertaining to this Section	
Creating and Editing a Book Style Page Customization List	Printing a Workforce Analysis Graph
Customizing the Printed Header and Footer Information	Printing the Published EChart as PDF
Previewing a Book Style Chart	Printing Your Chart as a Book
Previewing a Wall Style Chart	Selecting Pages to Print in a Book Style Preview
Printing a Chart Legend	Sending the Chart to Microsoft PowerPoint
Printing a Wall Style Chart	Using Print Preview Enhancements to Print Charts

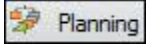
All print and preview options for published charts have been outlined in previous sections, as noted in the links in the table above.

Organizational Planning for Administrators

Many tasks listed here are applicable to both Organizational and Succession planning charts.

Topics Pertaining to this Section	
Creating a New Planning Chart	Opening a Planning Chart
Creating New Groups for Planning Charts Using the Group Creation Assistant	Selecting a Planning Chart Style
Deleting a Planning Chart	Sending the Planning Chart to Another User
Exporting Change Data	Setting Levels for Planning Charts
Generating a Revision History/Change Report	Showing the Change Icon in Planning Charts
Managing Planning Charts	Storing Planning Charts
Moving a Planning Chart	

Creating a New Planning Chart

1. Open the planning-enabled chart in the web browser and click the Planning button 

. (This button may vary, depending on the type of planning chart selected.)

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2. You may have to select the type of planning chart you want to create from the options list, **Organizational Planning** or **Succession Planning**. The *Organizational Planning Charts* dialog opens.
3. Click New. The dialog indicates where the planning chart begins, such as "This chart will include boxes from (name) and down." For instance, your chart administrator may publish the chart for you to work only from your box down.
4. The planning chart name defaults to "OrgPlan for" and names the top person in the chart, as well as the name of the original chart. Type a name for the chart if you do not want to accept the default name.
5. If not already enabled by the chart administrator, you can select the **Password protect this chart** check box to require typing a password whenever the chart is opened.
6. Type the **Password** then **Retype password**.
7. If you want a shortcut to the planning chart to display on your desktop, select the **Create a shortcut to the** chart **on my Windows desktop** check box.
8. Click Create and edit chart. The browser opens the Organizational Planning chart with the Insert Toolbar, the Generate a change report, and email buttons enabled.



Figure 218.

The planning chart saves to the folder specified when the original chart was published. PluginX planning charts can be saved to the local hard drive or the web server.

Note: If you save multiple planning charts to the same web folder, you must specify separate storage folders in order to maintain user name and password security.

When you create a planning chart, verify that the box you have selected as top of chart is correct. Once the planning chart is created, drilling up from the designated top of chart is not available.

Deleting a Planning Chart

1. Open the planning-enabled published chart in the web browser. Click the Planning button Planning.
2. You may have to select the type of planning chart you want to create from the options list, **Organizational Planning** or **Succession Planning**. The Organizational Planning Charts dialog opens.
3. Select the chart from the list and click Delete.

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4. A message states that the task cannot be undone and verifies that you want to delete a planning chart.
5. Click **Yes**. A message verifies that the selected chart has been deleted.

Exporting Change Data in Planning Charts

When you generate change reports you can choose to export data that has changed in order to create a comma separated file reflecting changes to upload into a source HR system. You select the desired fields, and the resulting Microsoft Excel file contains three tabbed worksheets:

- Added position data records
- Removed position data records
- Edited data records (field data modified or movement in the chart)

1. In the planning chart, select **Report** from the menu then **View revision history** from the options list. You can also click the Generate a Change Report button  in the toolbar.
2. Select the report data you want to see in the **Generate Report** tab. Click the **Export Change Data** tab.

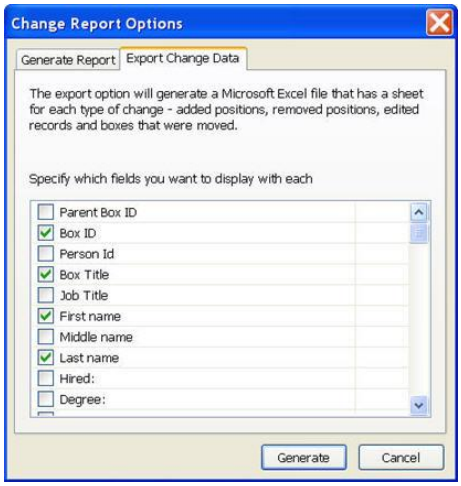

Change Report Options
Generate Report
Export Change Data
The export option will generate a Microsoft Excel file that has a sheet for each type of change - added positions, removed positions, edited records and boxes that were moved.
Specify which fields you want to display with each
Parent Box ID
Box ID
Person Id
Box Title
Job Title
First name
Middle name
Last name
Hired:
Degree:
Generate
Cancel

Figure 219.

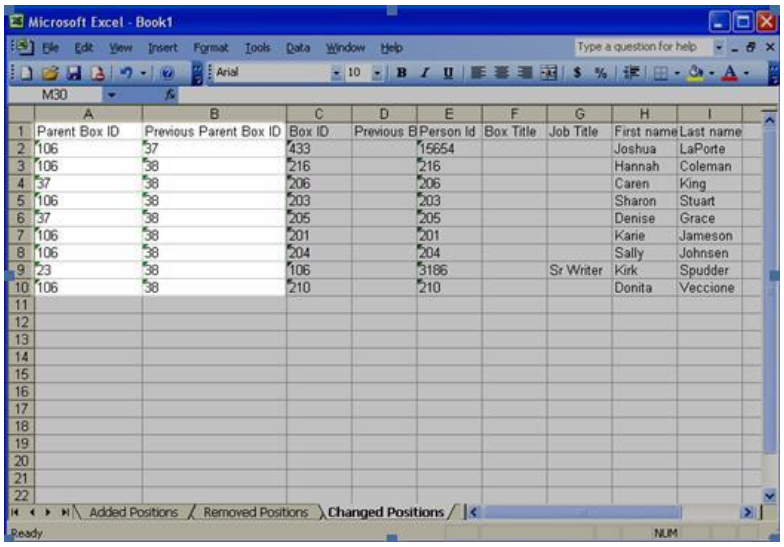
3. Click **Generate**. If you selected to **View report in web browser**, the browser displays a basic HTML report that summarizes the changes made in the chart using **Before** and **After** columns, as well as the **Change percent**.

   The HTML file is saved to your local drive in the in the **Local Settings/Temporary** folder. You can also save the report by using the browser **File>Save As** option.

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If you selected **View report in Microsoft Excel**, both the report sheet and export data sheets open with the 3 tabbed sheets.



	A	B	C	D	E	F	G	H	I
1	Parent Box ID	Previous Parent Box ID	Box ID	Previous B	Person Id	Box Title	Job Title	First name	Last name
2	106	37	433		15654			Joshua	LaPorte
3	106	38	216		216			Hannah	Coleman
4	37	38	206		206			Caren	King
5	106	38	203		203			Sharon	Stuart
6	37	38	205		205			Denise	Grace
7	106	38	201		201			Karie	Jameson
8	106	38	204		204			Sally	Johnsen
9	23	38	106		3186		Sr Writer	Kirk	Spudder
10	106	38	210		210			Donita	Veccione

Figure 220.

Generating a Revision History

You can create a revision history when modifying web-based planning charts. After you have modified an OrgPlan chart, or have been sent a modified planning chart, you can see who modified the chart on what day the modification occurred.

1. In the planning chart, select **Report** from the menu then **View revision history** from the options list. You can also click the Generate a change report button in the toolbar.
2. The browser displays a basic HTML page with the revision information. The **User** and **Date** fields are automatically recorded. A **Comment** is entered as an option and may or may not be available.
3. You can use the browser menu to save the revision history, copy and paste it into another application, or send it to someone via an email message.

Managing Planning Charts

When viewing a published planning enabled chart (OrgPublisher Premier), you can manage the planning charts.

When you click the planning charts button the first time, the standard create a chart dialog opens. The planning button varies, based on the type of planning chart.

Org model planning button - Organizational Planning

Succession planning button - Succession Planning

Both planning options - Planning

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If a planning chart already exists, you see the list of existing charts. You can select a chart to delete, open to edit, or create a new planning chart.

Moving a Planning Chart

A published planning-enabled chart (succession or org modeling) can be published to a new location other than the default location.

1. Publish or open an already published planning enabled chart.
2. In the toolbar, click the Planning button  .

   The *Planning Charts* dialog opens.

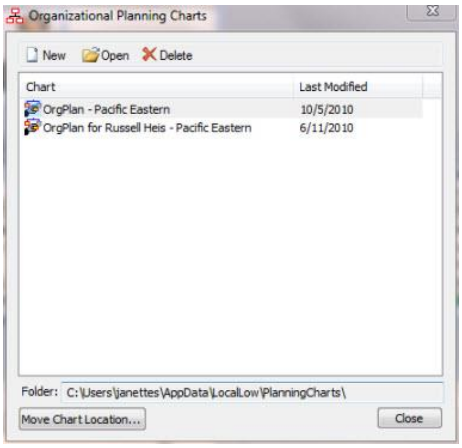


Figure 221.

3. Click **Move Chart Location** at the bottom of the dialog.

   The *Browse for Folder* dialog opens.

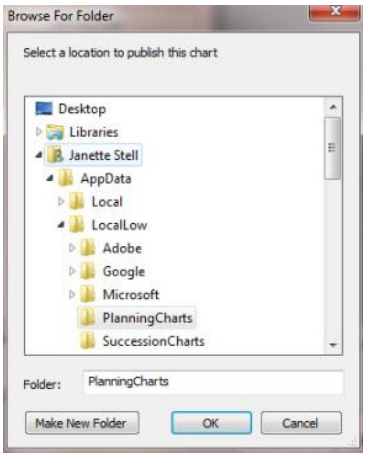


Figure 222.

4. Navigate to the folder where you want publish the chart, or select **Make New Folder** to create a new location for the published chart.

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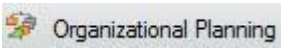
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5. Click **OK** to move the chart to the new location.

Opening a Planning Chart

Planning administrators can open a planning chart (OrgPublisher Premier) from the planning-enabled published chart.

Note: If you save multiple planning charts to the same web folder, you should specify separate storage folders in order to maintain user name and password security.

1. Click on the Planning button 

in the toolbar.
2. Select **Open planning chart** from the options list. A list of available planning charts displays in a pull-down list.
3. Click on the chart name you want. The planning chart opens in the OrgPlan client.
4. Return to the planning-enabled chart by clicking the Back  button in the browser.

Selecting a Planning Chart Style

Click the Select Style  button in the toolbar to open the *Select Style* dialog to choose a layout style for the planning chart. Click on a layout for additional information.

Chart Layout	Description
	**Layout 1** **Horizontal** - Lowest level of each branch in the chart is arranged in a horizontal line. This creates shorter, wider charts.
	**Layout 2** **Vertical** - Lowest level of each branch in the chart is arranged in a vertical row. This creates narrower, taller charts.
	**Layout 3** **Side by side** - Lowest level of each branch in the chart is arranged with the boxes side by side. This creates more compact charts.
	**Layout 4** **Stacked** - Lowest level of the chart (displays only two levels) is arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.

Sending the Planning Chart to Another User

You can send your planning chart and the change report to another approved user via e-mail.

1. In the planning chart, select **Report** from the menu then Send chart to another user from the options list. You can also click the Send chart to another user  button in the toolbar. The *E-mail OrgPlan* dialog opens.

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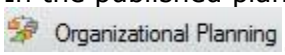
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2. Select the radio button that matches what you want to do, **Send chart and a change report**, **Send chart only**, or **Send change report only**.
3. Click **OK**. Your e-mail client opens a message with the attachments in the e-mail. The planning chart file attachments include an OCP and HTM file.
4. Type the e-mail address or addresses to which you would like to send the attachments. Click **Send**.

   You may encounter an error when sending a planning chart created on a local machine using Microsoft Vista. It is recommended that you use a secured server location.

Setting Levels for Planning Charts

When creating a new planning chart (OrgPublisher Premier), you can determine how many levels to allow in the planning chart.

1. In the published planning enabled chart, click the Organizational Planning button 

. This button may vary, depending on whether or not Succession Planning has been enabled.
2. If planning charts exist, the *Planning Charts* dialog opens with a list of existing planning charts. Click the New 

button.

   If no planning charts currently exist, the *New Planning Chart* dialog opens automatically.

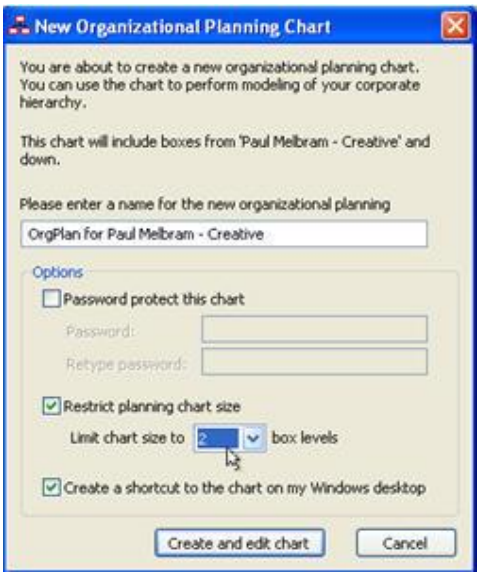

New Organizational Planning Chart
You are about to create a new organizational planning chart. You can use the chart to perform modeling of your corporate hierarchy.
This chart will include boxes from 'Paul Melbram - Creative' and down.
Please enter a name for the new organizational planning
OrgPlan for Paul Melbram - Creative
Options
Password protect this chart
Password:
Retype password:
Restrict planning chart size
Limit chart size to
box levels
Create a shortcut to the chart on my Windows desktop
Create and edit chart
Cancel

Figure 223.

3. Select the **Restrict planning chart size** check box.
4. Use the down-arrow to select the number of levels you want to Limit chart size to field.

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Showing the Change Icon in Planning Charts

You can determine if you want to display the change icon in the planning chart box as changes are made.

1. Select **View** in the planning-enabled chart Main menu.
2. If there is a check mark beside **Show Change Icons**, and you do not want to show the icons, then click the check mark to clear it.

   This closes the menu and removes the displayed change icons in the chart boxes.
3. If there is no check mark and you do want to display the change icon, select **Show Change Icons**. The change icons appear in chart boxes that have changed.

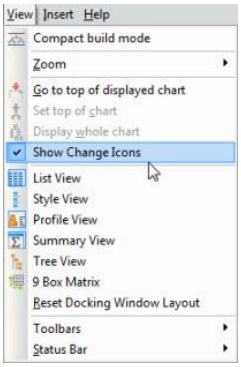


Figure 224.

Storing Planning Charts

When you publish a secured EChart using OrgPublisher Premier's organization modeling or succession planning, you can store your planning charts either on the end user's PC or the EChart web server.

1. In the planning chart, select **File** from the Main menu then **Preferences** from the options list. The *Preferences* dialog opens.



Figure 225.

   The dialog displays the default locations set by the IT administrator. If you have the appropriate permissions, you can select to store the planning chart on a local drive or a network location.
2. Type or **Browse** to the folder on the server to store planning charts, and verify that the folder is secure - accessible to the EChart sever but not to HTTP requests. If you are in doubt about the security, contact your IT administrator.
3. Click **OK** to save the specified folder and return to the planning chart.

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Note: Planners may encounter an error when sending a planning chart created on a local machine using Microsoft Vista. It is recommended that administrators use a secured server location.

Succession Planning for Administrators

Many tasks listed here are applicable to both Organizational and Succession planning charts.

Topics Pertaining to this Section	
Adding a Succession Candidate to a Box	Generating a Revision History/Change Report
Changing a Job Title	Printing the 9 Box Matrix
Changing a Position Type	Modifying Successor Fields
Creating a New Succession Planning Chart	Searching for Person Succession Counts
Creating a Successor	Searching for Successors in a Box
Creating Side-by-Side Profiles	Spotlighting Succession Groups
Deleting a Successor	Updating an Open Position
Drag and Drop from 9 Box Matrix	Using Succession Candidates in Groups
Exporting Change Data	

Adding a Succession Candidate to a Box

When you create a succession planning chart, the chart opens with no hierarchical information included because this type of chart is meant to help you plan for successors to specific positions within your company.

1. In the Chart View, drag and drop individuals from their current box into the box of the position for which they are candidates.
2. Save the chart with your changes.

Adding a Second Successor Position

A person may be a successor to more than one position.

Add a Successor with Drag and Drop

1. Place the mouse pointer on the person's name you want to become a successor. Hold down the left mouse button to select the name, which is outlined with a solid red line.
2. Continue to hold down the left mouse button and drag the name to the position needing a successor. The pointer includes a person icon while moving to the new box. When the cursor is on top of the current position holder's name (a dotted red line outlines the name), release the mouse button.

   The successor's name appears below the current position holder and a change icon appears in the top right of the chart box.

Add a Successor with Copy and Paste

1. Place the mouse pointer on the person you want to become a successor.
2. Right-click and select **Copy**.

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3. Locate the box containing the current position holder by one of the following methods:
   - Searching for the person's name and clicking to navigate to the person
   - Drilling to the person
   - Scrolling
   - Place the pointer on the position holder's name and right-click.
4. Select **Paste**. The copied record is now a successor.

Changing a Job Title in Planning Charts

When working with a planning chart, you can change job titles or position types.

1. Double-click on the job title in the *Chart View*. The *Rename Job Title* dialog opens.
2. Type the new title over the old one.
3. Click **OK**. The new title displays in the chart box.

Changing a Position Type in Planning Charts

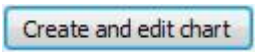
When working with a planning chart, you can change position types.

1. Double-click on the person's name in the *Chart View*. The *Update Person* dialog opens.
2. Double-click the new **Position type** you want to use. The *Update Person* dialog closes and the new position type is accepted. You can also select the new position type from the list, then click **OK**.

Creating a New Succession Planning Chart

1. Open the planning-enabled chart in the web browser and click the Planning button 

. (This button may vary, depending on the type of planning charts selected.) The *Succession Planning Charts* dialog opens.
2. Click 

. The *New Succession Planning Chart* dialog opens. If a current succession planning chart does not exist, the dialog opens as soon as you select the planning button.
3. Type a name for the chart if you do not want to accept the default, **OrgSuccession for...** title.
4. If not already enabled by the chart administrator, you can select the **Password protect this chart** check box to require typing a password whenever the chart is opened.
5. Type the **Password** then **Retype password**.
6. If you want a shortcut to the planning chart to display on your desktop, select the **Create a shortcut to the chart on my Windows desktop** check box.
7. Click 

. The browser opens the succession planning chart with the select toolbars, the Generate a change report  , and email  buttons enabled.

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Creating a Successor in a Succession Planning Chart

The easiest method for creating a successor in a succession planning chart is to use drag and drop.

1. Place the mouse pointer on the person's name you want to become a successor. Hold down the left mouse button to select the name, which is outlined with a solid red line.

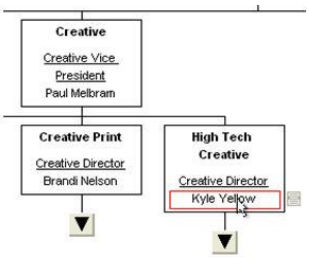


Figure 226.

2. Continue to hold down the left mouse button and drag the name to the position needing a successor. The pointer includes a person icon while moving to the new box.
3. When the cursor is on top of the current position holder's name (a dotted red line outlines the name), release the mouse button.

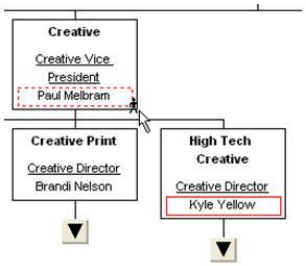


Figure 227.

The successor's name appears below the current position holder and a change icon appears in the top right of the chart box.

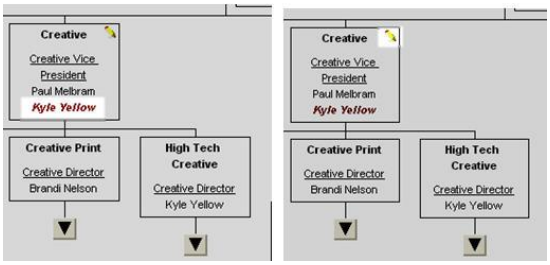


Figure 228.

You can also copy and paste a successor into the new location within the succession planning chart. This method is helpful when placing someone in a box that is outside of the chart viewing area.

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4. Place the mouse pointer on the person you want to become a successor. Right-click and select **Copy**.

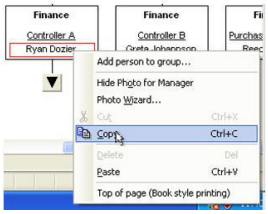


Figure 229.

5. Locate the box containing the current position holder by one of the following methods:
   - Searching for the person's name and clicking to navigate to the person
   - Drilling to the person
   - Scrolling
6. Place the pointer on the position holder's name. Right-click and select **Paste**.

   The copied record is now a successor.



Figure 230.

Creating Side-by-Side Profiles

Side-by-Side Profile View allows you to look at multiple profiles at the same time. See also, Saving Side-by-Side Profiles as a Group.

1. Open the Profile View. The profile for the top box appears.
2. Select the person in the chart you want to see in the side-by-side *Profile View*. The profile opens in the *Profile View*.
3. Click the pin button  in the upper right corner to anchor the profile. The profile is anchored and moved to the right, and a placeholder is created on the left for the next profile.

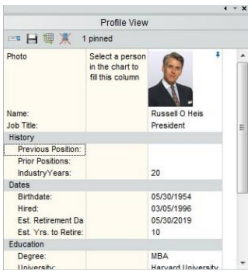


Figure 231.

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4. Click on another person's name, job title, or box title (depending on the data you are profiling; you want to compare like data fields) to populate the placeholder with the selected person's information.

   If the added profile is pinned, both pinned profiles move to the right, and an additional placeholder appears.

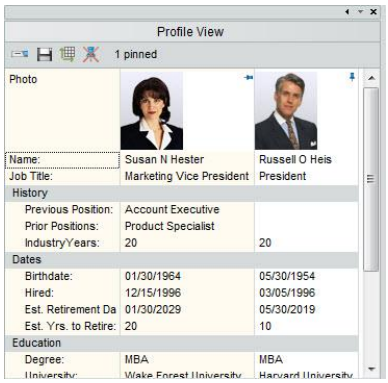


Figure 232.

5. Continue selecting and pinning the profiles you want, repeating Steps 2-4.

Deleting a Successor

You may need to remove a person from a successor role.

> **Note:** OrgPublisher does not leave an open position in the box when a successor is deleted.

1. Right-click on the person's successor position in the chart.
2. Select **Delete** from the options list. This deletes only that successor occurrence of the person in the chart.

Drag and Drop from 9 Box Matrix in Planning Charts

You can drag a person's name from the 9 Box Matrix, available in OrgPublisher Premier, and drop it into the org model planning chart or succession planning chart.

1. In the *9 Box Matrix*, click the name you want to add to the chart and hold down the mouse button.
2. Drag the cursor to the target box in the chart.
3. When the cursor is over the field where you want to drop it, release the mouse button.

   If you are working with org model planning, the name replaces the name in the target box.

   If you are working with succession planning, the name is added as another successor, or replaces the existing successor.

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Drag and Drop from Search View in Planning Charts

You can drag a person's name from the *Search View* and drop it into the org model planning chart or succession planning chart.

1. After you conduct your search, click the name you want to add to the chart and hold down the mouse button.
2. Drag the cursor to the target box in the chart.
3. When the cursor is over the field where you want to drop it, release the mouse button.

   If you are working with org model planning, the name replaces the name in the target box.

   If you are working with succession planning, the name is added as a, or replaces the existing, successor.

Modifying Successor Fields

Planners can modify successor fields in the Succession Planning chart. You can cut, copy, and paste the successor names and associated ranking fields. You can also drag a name from the List View or Search View and place in a successor slot.

You cannot, however, modify any other position type or associated field.

If enabled by your administrator, the change icon displays in the succession chart box as changes are made.

Moving a Successor

In Succession Planning, available in OrgPublisher Premier, once a successor is in the chart, you can move them to a new location with drag and drop.

1. Place the mouse pointer on the successor's name. Hold down the left mouse button and drag to the new location.

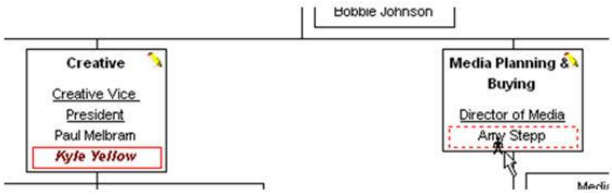


Figure 233.

2. Release the mouse button. The successor displays in the new box.

Cut and Paste Successors

1. Place the mouse pointer on the successors name and right-click.
2. Select **Cut** from the options list.
3. Place the mouse pointer on the new location and right-click.

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4. Select **Paste** from the options list. The successor displays in the new box.

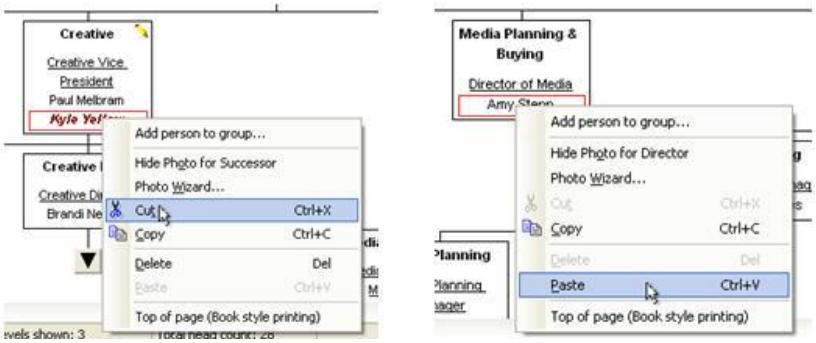


Figure 234.

Rearranging Successors in a Box

After adding all of the successors, you may want to rearrange them to indicate who has what rank in line for the position.

- first (**Successor 1**)
- second (**Successor 2**)
- third (**Successor 3**)

1. Place the mouse pointer over the name of the successor who should appear first in the list of successors.



Figure 235.

2. Hold down the left mouse button and drag the successor on top of the current position holder's name.



Figure 236.

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3. Release the left mouse button.



Figure 237.

4. Place the mouse pointer over the second successor in line for the position. Hold the left mouse button down and drag the successor on top of the first in line successor's name.
5. Release the mouse and the second in line appears below the first in line successor.

Using a Group Icon for Succession Groups

This example uses a group created to show succession candidates who are designated to succeed more than one position.

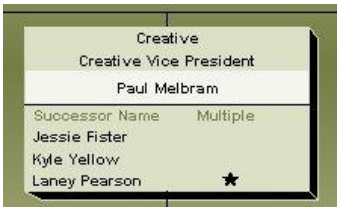


Figure 238.

Using a Multi-Report Icon for Succession Groups

Uses the employee ID to determine if a succession candidate is in the chart more than once. When the user clicks the icon, the Search View opens with a list of all occurrences of the person in the chart. If indirect reports are in the chart and the person is also a successor, the indirect role appears in the list.



Figure 239.

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Searching for Person Succession Counts

The **Person succession count** uses the Succession Candidate position type to determine if a person is slated for more than one position. Your organization may want to see everyone slated for more than one position. You may also want to create groups showing people slated for 2 positions, 3 positions, etc.

1. Open the *Search* dialog by clicking 

.
2. If you have selected a specific box in the Chart View, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.

   If you are using the Search View and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
3. Select the **All Fields** tab.
4. In the Search field, click the drop-down arrow to select **Person successor count**. You can also press the key of the first letter of the field you want to navigate through the list.
5. In the **For** field, type the number you want to search on. For instance, if you want to see how many positions contain more than one successor, type the number **2**.
6. In the **Match** field, click the down-arrow to select **= Any Part of Field**.
7. Click **Search Now** or 

. OrgPublisher performs the search and displays the matching records in the lower pane.
8. You can save the search results as a group or perform an additional search.

Searching for Successors in a Box

This search option provides a list of people in a box containing a selected number of successors, and helps you locate where you have no successors or too many successors for a specific position.

1. Open the *Search* dialog by clicking the Search button 

in the toolbar.
2. If you have selected a specific box in the *Chart View*, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.
3. If you are using the *Search View* and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
4. Select the **All Fields** tab.
5. In the **Search** field, click the drop-down arrow to select **Successor(s) in a box**. You can also press the key of the first letter of the field you want to navigate through the list.

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6. In the **For** field, type the number of successors in a box you want to find. For instance, if you want to see all boxes that contain more than one successor, type 1.
7. In the **Match** field, click the down-arrow to select **= Whole Field**.
8. Click **Search Now** or  . OrgPublisher performs the search and displays the matching records, successors and managers in the box in the lower pane.
9. You can save the search results as a group or perform an additional search.

Spotlighting Succession Groups

You can use the spotlighting a group feature with succession groups (OrgPublisher Premier) you have created. You can use this feature alone or you can use it in conjunction with spotlighting search results.

1. To enable the spotlight group feature, select a succession group to display in the chart from the Filter View.
2. Right-click on the group label in the Style Bar to view the options list.
3. Click **Group filter in chart** then **Spotlight boxes in group**.

   The first example uses a succession group created to show people who are designated to succeed more than one position.

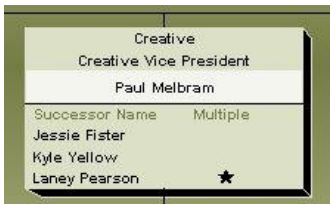


Figure 240.

The second example uses a succession group created to find managers with no successors.



Figure 241.

Note: When printing a chart with the spotlighting feature enabled, if your printer does not support AlphaBlend, your printed chart will show all boxes as in the past. See your IT administrator if you have any questions.

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Updating an Open Position in Planning Charts

You can update a position type in a planning chart.

1. Double-click on the open position in the *Chart View*. The *Update Person* dialog opens.

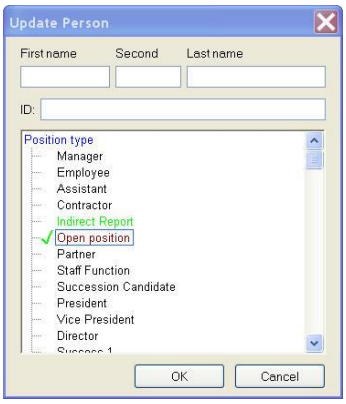


Figure 242.

2. Type the **First name** and **Last name** of the person filling the open position.
3. Select the appropriate **Position type** from the list.
4. Click **OK**. The new position type and name display in the chart box

Using Succession Candidates in Groups

After you have created a group or groups with the results you require, you can use one of several options to indicate persons meeting the succession group criteria. Some examples are:

Search Results for Succession Candidates

- The first example uses a group created to show people who are designated to **succeed more than one position**.



Figure 243.

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- The second example uses a group created to find **managers with no successors**.

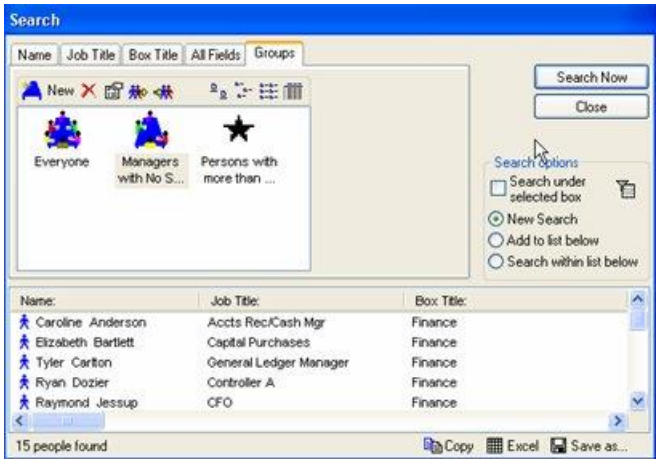


Figure 244.

Cross Browser Silverlight Charts

When your chart is published for cross browsers using Microsoft Silverlight, your chart will look different from the previous published charts.

Note: The Cross Browser/Silverlight charts have been redesigned in OrgPublisher 11.6. If that is the version you have installed, please proceed to the 11.6 Cross Browser Enhancements section.

Topics Pertaining to this Section	
Conducting a Search	Sending Feedback to PeopleFluent
Configuring Search View	Sending the Chart to PDF
Moving the Search Results View	Showing/Hiding Cross Browser Toolbar
Personalizing Cross Browser Settings	Viewing Profiles in the Cross Browser Chart
Printing the Cross Browser Chart	Viewing Cross Browser Chart Tutorials
Resizing the Search Results View	

Conducting a Search in a Published Silverlight Chart

If enabled by your administrator, you can search fields in a published cross browser/Silverlight chart.

1. In the field adjacent to the Search button 

in the toolbar, type the name or partial name of the field you want to find. Click 

.

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The search results open in a *List View* dialog.



Figure 245.

2. Click the ellipsis next to the name to expand the view. Select the name you want to see in the chart.

   OrgPublisher moves to the box location in the chart and highlights your selection.



Figure 246.

You can also view the search results in a *Panel View* .



Figure 247.

Or, you can view the search results in a *Grid View* '



Figure 248.

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Configuring Cross Browser Search View

If enabled by your administrator, you can search fields in a published cross browser/Silverlight chart.

1. Once the search results view opens, right-click on the blue bar at the top of the view.



Figure 249.

The options list appears.

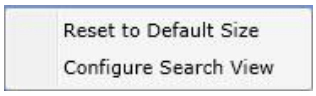


Figure 250.

2. Click **Configure Search View**.

The *Search Results Configuration* dialog opens.

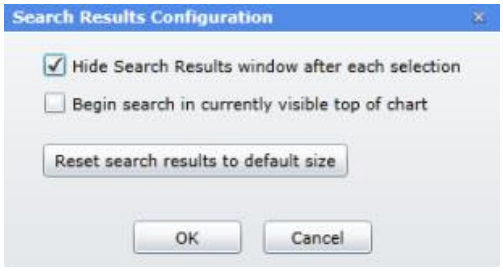

Search Results Configuration
Hide Search Results window after each selection
Begin search in currently visible top of chart
Reset search results to default size
OK
Cancel

Figure 251.

Three configuration options are available.

Hide Search Results window after each selection - the default selection; hides the view once you have made a selection from the results list. You can clear the check box if you want the view to remain open. Unless you resize or move the view, this option may actually hide the chart box you want to view.

Begin search in currently visible top of chart - this option limits the search area to the selected top of chart and levels below.

Reset search results to default size - if you have modified the size of the search results view, this option is enabled to reset the view to the default size. If the default size has not been changed, this button is not enabled.

3. Make the selection you want and click **OK**. The chart displays your choices.

Moving the Cross Browser Search Results View

If enabled by your administrator, you can search fields in a published cross browser/Silverlight chart. Once the search results view opens, you can drag and drop the search results view to another location in the chart.

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1. Click the mouse button and hold on the blue bar at the top of the view.



Figure 252.

2. Drag the view to the location you want in the chart and release the mouse button to drop the view.

Personalizing Settings in a Published Silverlight Chart

If enabled by the chart administrator, you can personalize settings in your published cross browser/Silverlight chart.

1. Click the Personalize settings button  . The button may be visible on the toolbar; if not, click 

and select the **Personalize settings** option from the drop list.

   The *Personalize Settings* dialog opens.

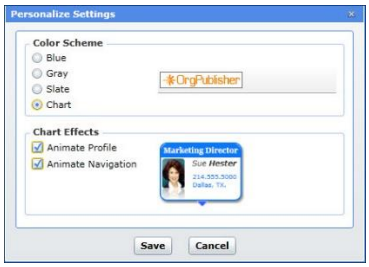


Figure 253.

2. In the **Color Scheme** pane, select the color scheme you would like to use, or keep the default selection, **Chart**, in which the chart was published. A preview appears to the right.
3. In the **Chart Effects** pane, select the animation affects you would like to use in your chart. A sample of the animation appears to the right.
4. Click **Save** to keep your choices and close the dialog.

Printing the Published Cross Browser Chart

If enabled by the chart administrator, you can print your published cross browser/Silverlight chart in wall style (one displayed page at a time).

1. Click the Print button  . The button may be visible on the toolbar; if not, click 

and select the **Print this page** option from the drop list.

   The *Print this page of the Org Chart* dialog opens.

2. Accept the default of **Shrink to Fit** (recommended) or clear the check box.
3. Click **Print** to print the displayed levels in the chart view.

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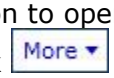
Resizing the Cross Browser Search Results View

If enabled by your administrator, you can search the published cross browser/Silverlight chart. Once the search results open, resize the view to be either smaller or larger.

1. Move the mouse cursor to the lower-right corner of the search results view.
2. When the mouse pointer changes to a double-ended arrow, select the corner  .
3. Click the mouse button and hold it down until the view is the size you want, then release the button.

Sending Feedback from Published Cross Browser Chart

If enabled by the chart administrator, you can send feedback about the cross browser/Silverlight chart.

1. Click the  button to open your email client. The button may be visible on the toolbar; if not, click  and select the **Send feedback** option from the drop list.
2. The email opens with the **To** and **Subject** fields filled in. Type your message then click **Send**.

Sending the Published Cross Browser Chart to PDF

If enabled by the chart administrator, you can print the published cross browser/Silverlight chart as a PDF document.

1. Click the Send to PDF button  . The button may be visible on the toolbar; if not, click  and select the **Send to PDF** option from the drop list. The Send to PDF dialog opens.

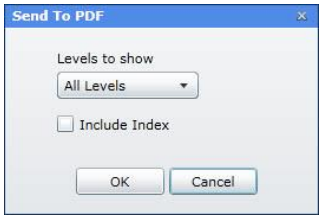


Figure 254.

2. Select the chart **Levels to show** in the PDF chart.
3. Select the **Include Index** check box if you want to add a list of all the boxes and associated fields at the front of the PDF document.
4. Click **OK** to send the chart to PDF. A progress bar displays while the PDF is created, and the document opens when complete.

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Showing/Hiding the Cross Browser Published Chart Toolbar

Your cross browser/Silverlight chart can be viewed with or without the toolbar.

1. To hide the toolbar, click the button.



Figure 255.

2. To show the hidden toolbar, click the button again.

Viewing Profiles in a Published Cross Browser Chart

If enabled, you can view an animated version of the *Profile View* in your cross browser/Silverlight chart. You can display several - or all- of the profiles in the chart at the same time. You can also print the chart with the profiles instead of the boxes.

1. Click the arrow in the chart box of the profile you want to see.



Figure 256.

The box flips to reveal the *Profile View*.

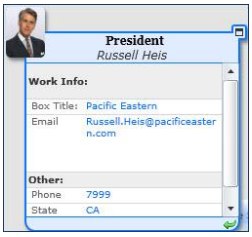


Figure 257.

2. Click the arrow at the bottom of the *Profile View* to return to the box.

Viewing Tutorials for Published Cross Browser Charts

You can view video tutorials on how to use a published cross browser/Silverlight chart.

1. Click the Tutorials button . The button may be visible on the toolbar; if not, click More and select the **View Tutorials** option from the drop list.

   The OrgPublisher Silverlight tutorials web page opens.

2. Select the tutorial you want to see.

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Cross Browser Planning Charts

Publishing a Cross Browser Planning Chart	Working with a Cross Browser Planning Chart
Publishing a Cross Browser Planning Chart	Logging in to a Cross Browser Planning Chart
Formatting Cross Browser Charts	Cross Browser Manage Plans Dialog
Formatting Cross Browser Style/Position Type	Creating a New Cross Browser Planning Chart
Selecting Cross Browser Viewing Options	Opening an Existing Cross Browser Plan
Showing/Hiding Toolbar Buttons	Modifying an Existing Cross Browser Plan
	Using the Cross Browser Planning Toolbar
	Using the Cross Browser Planning Action Button
	Adding a Direct Report in Cross Browser Planning
	Removing a Box in Cross Browser Planning
	Drag/Drop a Box in Cross Browser Planning
	Drag/Drop a Person in Cross Browser Planning

You can also publish a legend with Cross Browser/Silverlight charts. Whichever corner is chosen for the placement of the legend, the legend remains in that corner as you scroll up or down within the chart window.

Logging in to a Planning Cross Browser Chart

All cross browser planning charts must be secured.

1. Click the URL link in the publishing wizard to access the login window.
2. Type the **User ID** and **Password**.
3. Click **Login**. The progress graphic appears then, if the login data is correct, the cross browser chart opens.

Cross Browser Planning Manage Plans Dialog

The Manage Plans dialog opens when you click the  button from the planning enabled cross browser chart.

This dialog allows you to:

- Create new cross browser plans
- Open existing cross browser plans
- Modify existing cross browser plans

Creating a New Planning Chart in the Cross Browser

1. Select the tab for the style you want to use for planning.
2. In the toolbar, click the Organizational Planning button  . The Manage Plans dialog opens.

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3. In the **Manage Plan** section, click **Create New Plan**.

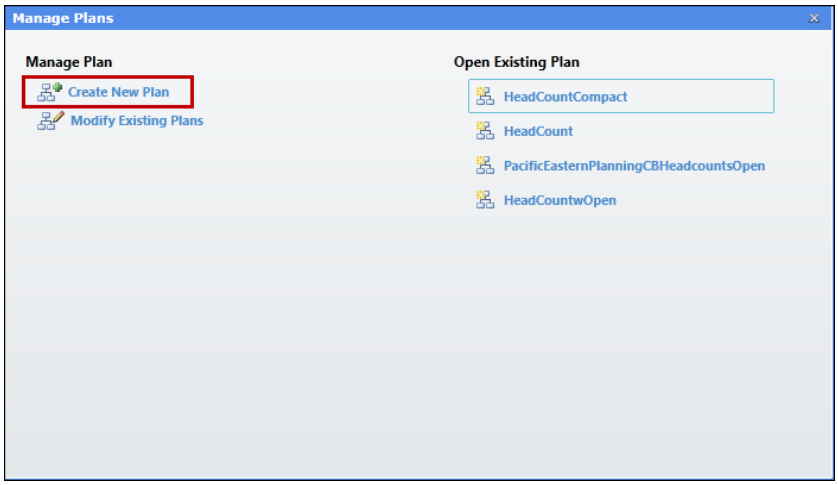


Figure 258.

The New Plan dialog opens.

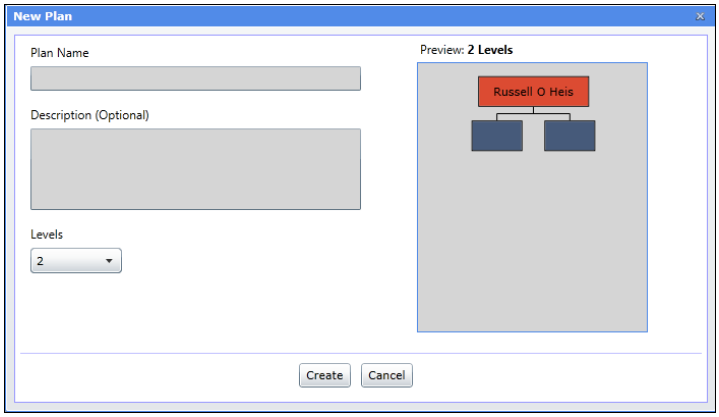


Figure 259.

4. Type the new **Plan Name**.
5. Type a **Description**, if applicable.
6. Select the number of **Levels** to use in the planning chart.
7. Click **Create**.

   If your chart contains multiple positions in chart boxes, a notification message appears, letting you know that drag and drop is disabled for those boxes.

8. Click the new planning chart name to open it.

   By default, the planning chart opens in the **Split Chart View**. This format makes drag and drop tasks easier, especially when working with a large chart. You can switch to a single view at any time.

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Opening an Existing Cross Browser Planning Chart

1. In the planning enabled chart, select the tab for the style you want.
2. In the toolbar, click the Organizational Planning button  . The Manage Plans dialog opens.
3. In the **Open Existing Plan** section, click on the plan name you want to open.

   The progress graphic appears and the planning chart opens.

Modify an Existing Cross Browser Planning Chart

1. Select the tab for the style you want to use for planning.
2. In the toolbar, click the Organizational Planning button  . The Manage Plans dialog opens.
3. In the **Manage Plan** section, click **Modify Existing Plans**. The Modify Existing Plans dialog opens, displaying a list of the current plans.
4. Select the section with the plan that you have just changed.

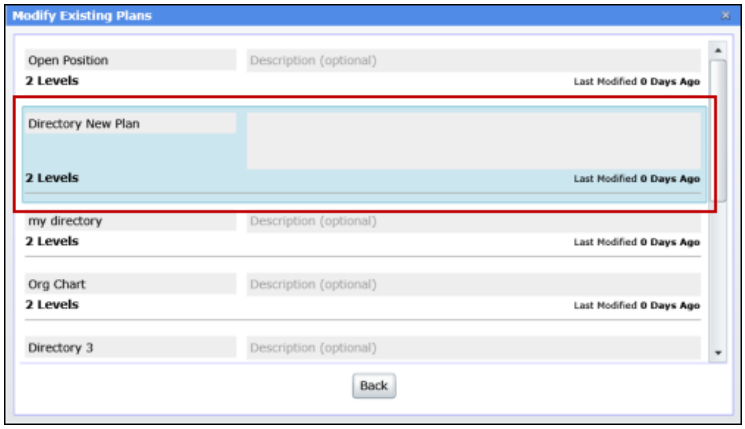


Figure 260.

5. Type a description of the modifications to the plan. You can also rename the plan.
6. Click **Back** to return to the Manage Plans dialog, or click the close button (**X** in the upper-right corner) to return to the planning enabled chart.

Using the Cross Browser Planning Toolbar



Figure 261.

The left side of the toolbar provides Undo  and Redo  buttons for tasks performed in the planning chart.

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The **View** section of the toolbar allows you to select a left  , split  , or right  view of the planning chart.

Using the Cross Browser Planning Action Button

The Action button appears in each box of the cross browser planning chart when you hover over the lower-right corner of a box.

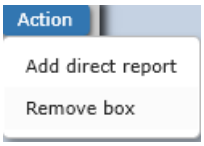


Figure 262.

This button allows you to perform two tasks:

Add a direct report

Remove a box

Adding a Direct Report in the Cross Browser Planning Chart

1. Hover the mouse cursor over the lower-right corner of the box where you want to add a new report.
2. Click the Action button  and select **Add direct report**. The Add Direct Report dialog opens.

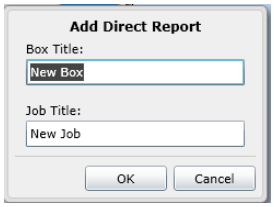


Figure 263.

3. Type the **Box Title** and **Job Title**. Click **OK**. A box for the new direct report appears in the chart. The job appears as an **Open position**.

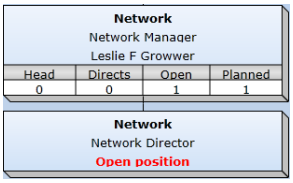


Figure 264.

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Removing a Box in the Cross Browser Planning Chart

1. Hover the mouse cursor over the lower-right corner of the box you want to delete.
2. Click the Action button Action and select **Remove Box**. A message appears, verifying that you want to delete the selected box. Click **Yes**.

   The box is removed from the chart.

   You can select the check box to not show this message in the future before you click Yes or No.

Dragging and Dropping a Box in the Cross Browser Planning Chart

1. Select the box you want to move. A purple glow appears around the box.

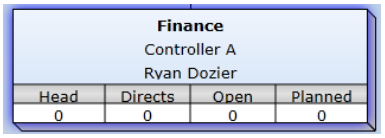


Figure 265.

2. Begin dragging the box in the direction you want to move it. The box turns translucent and green boxes with directional arrows appear in the chart.

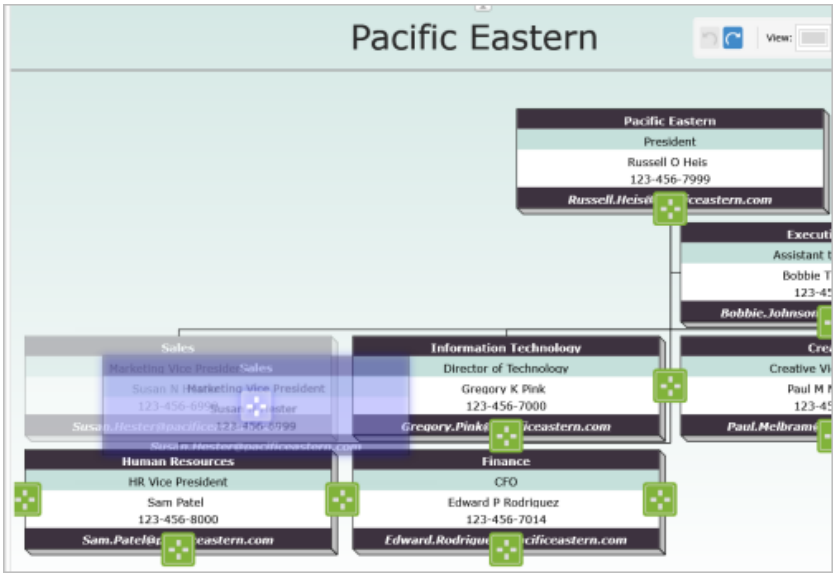


Figure 266.

These indicate all of the possible locations where the selected box can be dropped.

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3. Hover the box over the destination box. All of the green boxes disappear except for the one in the destination box.

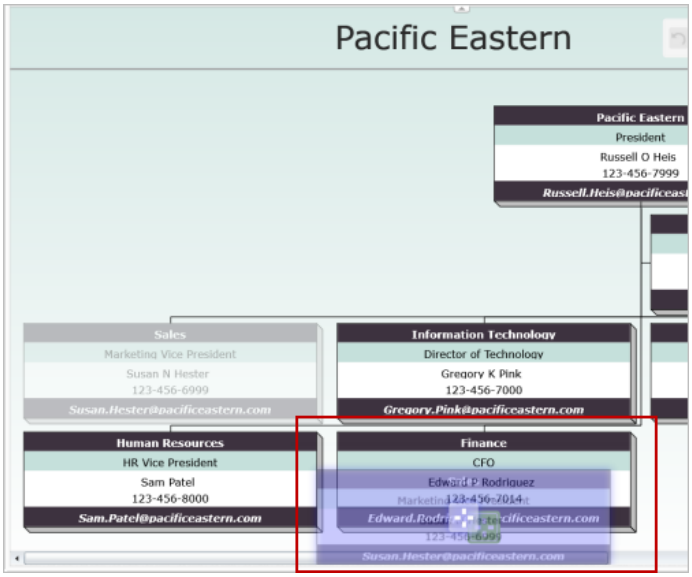


Figure 267.

4. Drop the selected box. It appears in the chart below the destination box.

Dragging and Dropping a Person in the Cross Browser Planning Chart

Persons in the cross browser planning chart can be dragged only to boxes with an Open position.

1. Select the person you want to move. A purple glow appears around that person name and any associated fields.

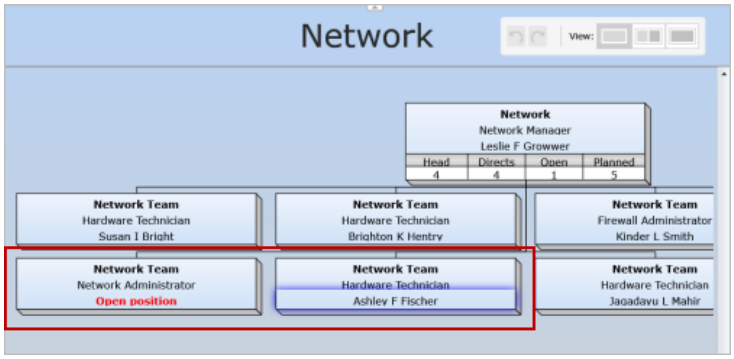


Figure 268.

2. Begin dragging the person toward the open position. The person and field data are now translucent and a small green dot is visible inside the moving area.

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Open positions in the chart are outlined in green, indicating a valid drop location.

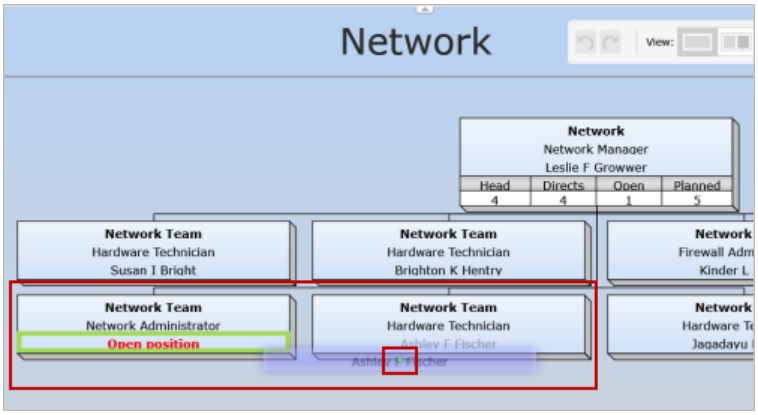


Figure 269.

3. Drop the name and associated fields onto an open position. The person name replaces the "open position" text in the drop location. The previous box now contains an open position where the person name used to appear.

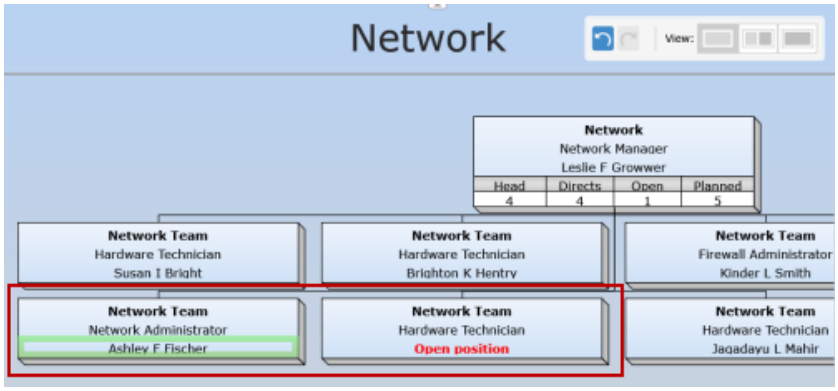


Figure 270.

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11.6 Cross Browser/Silverlight Chart Enhancements

With version 11.6, the cross-browser/Silverlight charts and planning charts have been redesigned.

Cross Browser/Silverlight Toolbar

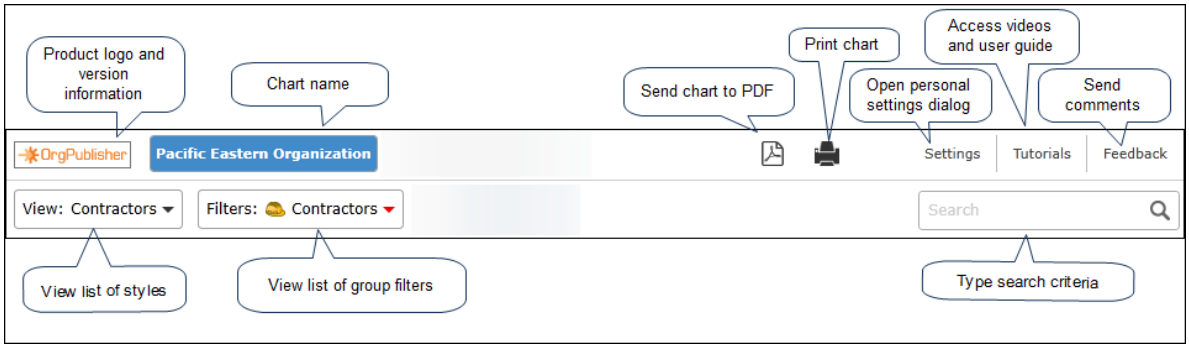


Figure 271.

The updated cross browser chart view reflects a redesigned profile and flip button  to move from the box to profile. The flip button displays when you hover over the upper-right corner of the box or profile.

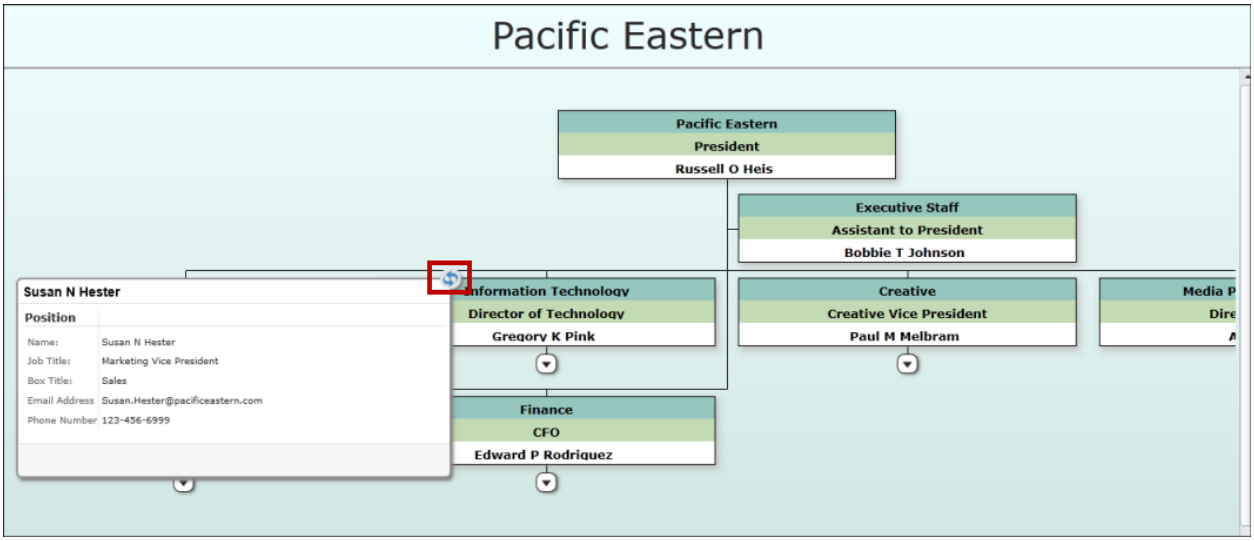


Figure 272.

 - Print the chart view through your print client.

 - Send the chart to PDF.

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Settings - Personalize settings chart settings.

Tutorials - Access video tutorials and user guide.

Feedback - Send comments and feedback on product experience.

Cross Browser Planning-Enabled Toolbar

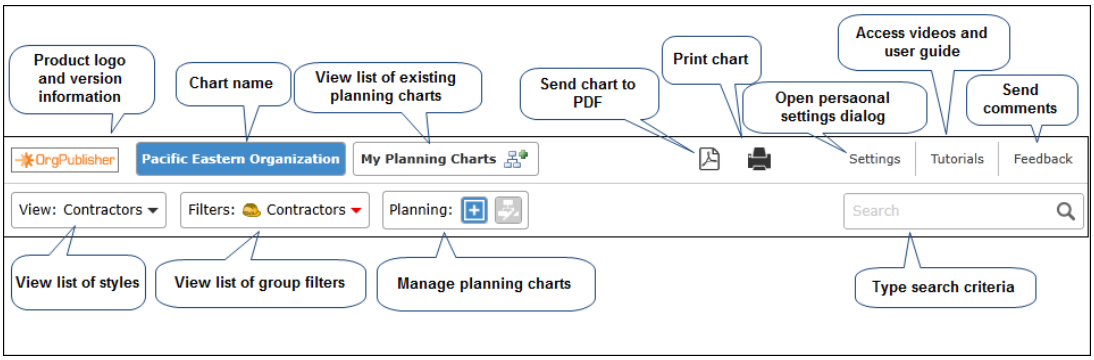


Figure 273.

If enabled by the administrator, the cross browser planning-enabled toolbar provides options to:

- Print the chart view through your print client.
- Send the chart to PDF.
- Settings - Personalize chart settings.
- Tutorials - Access video tutorials and user guide.
- Feedback - Send comments and feedback on product experience.
- My Planning Charts - Open planning charts.
- Planning: - Create new planning charts.
- Modify or delete planning charts.
- View: Salary and Head Count - Select chart styles.
- Filters: Everyone - Select group filters.
- Search - Search the cross browser chart.

Note: Data and hierarchical modifications can be performed in the planning chart only.

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Opening a Planning Chart

Planning charts can be opened from both the planning-enabled/source chart or from the planning chart.

1. Click the My Planning Charts button in the cross browser planning or planning-enabled chart.

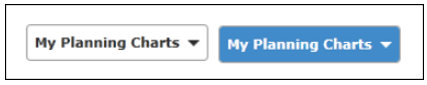


Figure 274.

A drop-down list displays your existing plans.



Figure 275.

2. Click the name of the plan you want to open.

   An activity graphic dialog appears, indicating the open chart progress.

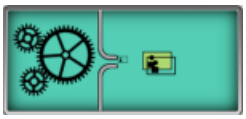


Figure 276.

The planning chart opens in the browser.

Deleting a Planning Chart

1. Click the Manage Plans button in the toolbar. The Modify Existing Plans dialog opens.



Figure 277.

2. Click the red X to the right of the chart name to delete it.

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Sending the Cross Browser Chart to PDF

If enabled by the chart administrator, you can print the published cross browser/Silverlight chart as a PDF document.

1. Click the Send to PDF button  . The Send to PDF dialog opens.
2. Select the chart **Levels to show** in the PDF chart.
3. Select the **Include Index** check box if you want to add a list of all the boxes and associated fields at the front of the PDF document.
4. Click **OK** to send the chart to PDF.
   A progress bar displays while the PDF is created, and the document opens when complete.

Cross Browser Planning Toolbar

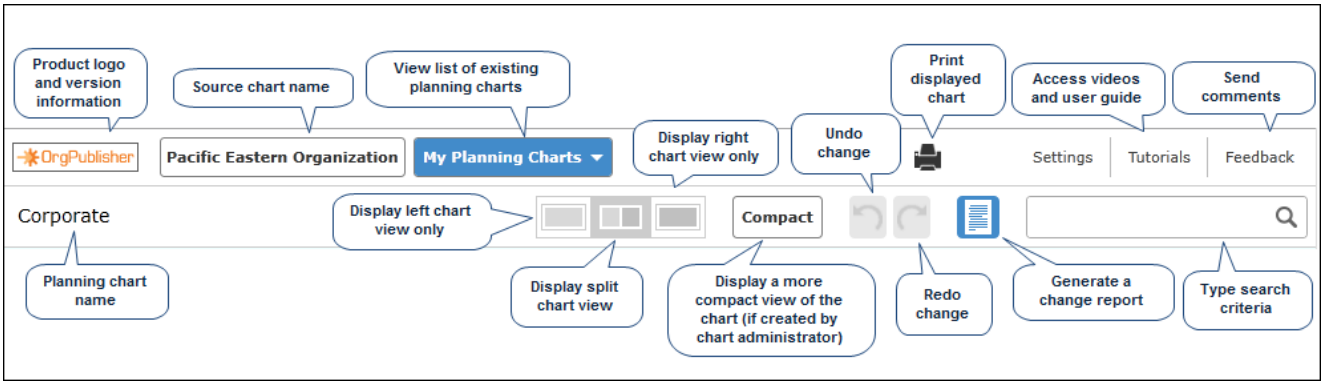


Figure 278.

If enabled by the administrator, the cross browser toolbar provides options to:

 - Print the chart view through your print client.

Settings - Personalize chart settings.

Tutorials - Access video tutorials and user guide.

Feedback - Send comments and feedback on product experience.

 - display left chart view only.

 - Display split chart view. Each side is independent of the other, allowing you to drag people or boxes from one view into the other.

 - Display right chart view only.

Compact - Displays a more compact view of the chart, if created by the chart administrator

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 - Undo recent changes.

 - Redo the reversed change.

 - Generate a change report.

Printing the Published Cross Browser Chart

If enabled by the chart administrator, you can print your published cross browser/Silverlight chart in wall style (one displayed page at a time).

1. Click the Print button  .

   The Print this page of the Org Chart dialog opens.


Print this page of the Org Chart
Set orientation to Landscape to maximize print area.
Shrink to Fit
Content may be truncated if checked off
Print
Cancel

Figure 279.

2. Accept the default of **Shrink to Fit** (recommended) or clear the check box.
3. Click **Print** to print the displayed levels in the chart view.

Personalizing Settings in the Cross Browser Chart

If enabled by the chart administrator, you can personalize settings in your published cross browser/Silverlight chart. The Search settings are described above.

1. Click the Settings button  .

   The Personalize Settings dialog opens.

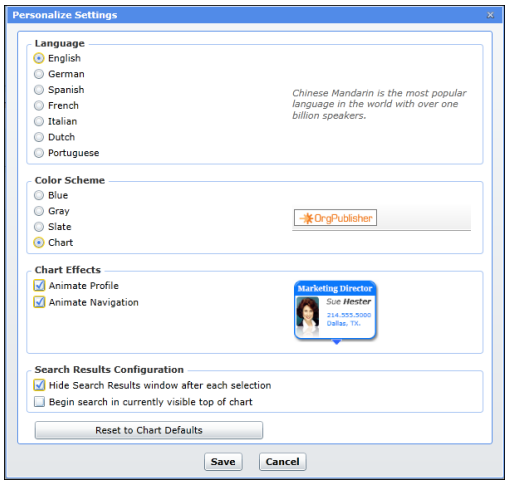


Figure 280.

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2. If applicable, select the **Language** you are using in your chart.
3. In the **Color Scheme** pane, select the color scheme you would like to use, or keep the default selection, **Chart**, in which the chart was published. A preview appears to the right.
4. In the **Chart Effects** pane, select the animation effects you would like to use in your chart. A sample of the animation appears to the right.
5. You can also click **Reset to Chart Defaults** to return to the published chart original settings.
6. Click **Save** to keep your choices and close the dialog.

Cross Browser Planning Chart Action Button Options

The **Action** button in the planning chart provides several options, depending on conditions, such as top box in chart, open position, etc.

Action menu options include:

Add direct report

Add Open position

Duplicate box

Remove Open position

Remove person and leave Open position

Fill position with internal transfer

Fill position with external hire

Remove person and position

Removing a box

Displaying the Action Button Menu

Hover the mouse cursor over the lower-right section of a chart box to enable the **Action** button. Click the button to display the options list.

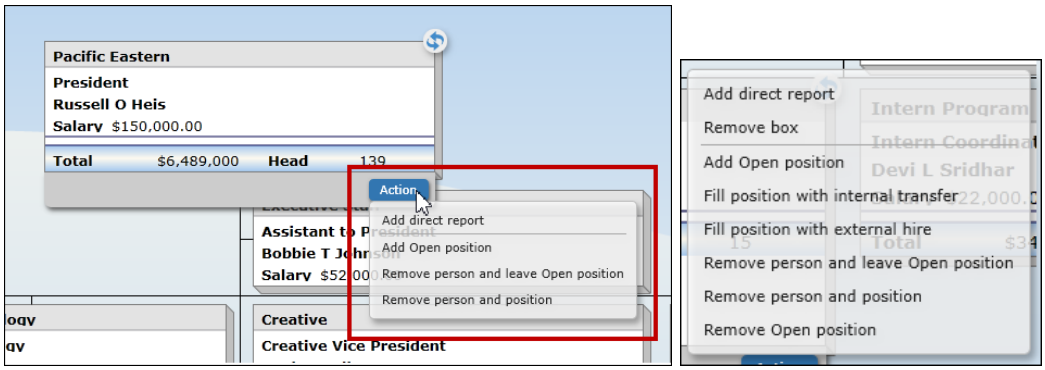


Figure 281.

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Note: The **Action** menu for the top box in the chart does not include the **Remove box** or **Duplicate box** options. You can remove the person, but not the box. There is only one top of chart allowed.

Adding a Direct Report

1. Select the box where you want to add the new report and hover the cursor over the lower-right corner. Click the **Action** button.
2. Click the **Add direct report** option in the options list.

   The Add Direct Report dialog opens.

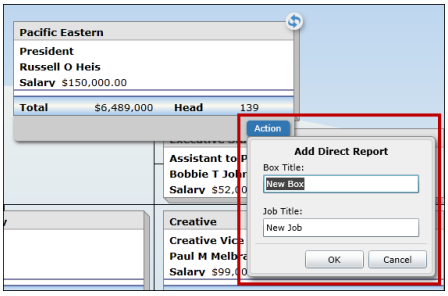


Figure 282.

3. Type a **Box Title** and **Job Title** and click **OK**.

   The new open position box appears below the selected action box.

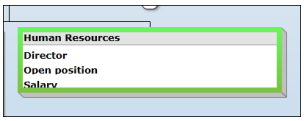


Figure 283.

Adding an Open Position

1. Select the box where you want to add the open position and hover the cursor over the lower right corner. Click **Action**.
2. Click **Add Open position** in the options list.

   An open position appears below any existing records and the selected box is outlined in green.

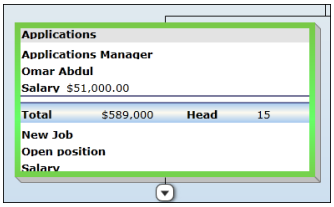


Figure 284.

Use the Action button again to fill the position.

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Duplicating a Box

1. Select the box you want to duplicate and hover the cursor over the lower-right corner. Click Action.
2. Click **Duplicate box** from the options list.

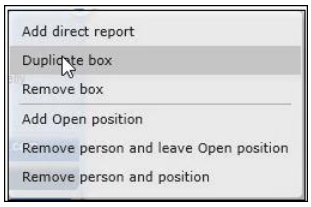


Figure 285.

Another box appears either next to or below the original box.

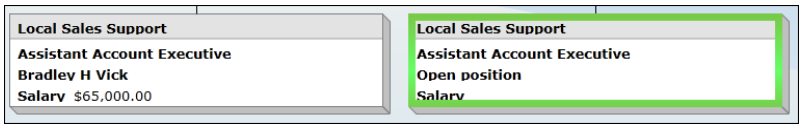


Figure 286.

The duplicated box contains the same base information, such as box and job title. All custom or personal information is removed and an open position is shown.

Removing an Open Position

1. Select the section in the box where you want to remove the open position and hover the cursor over the lower right corner. Click Action.
2. Click **Remove Open position** in the options list.

   A message displays asking you to verify this action. Click Yes.

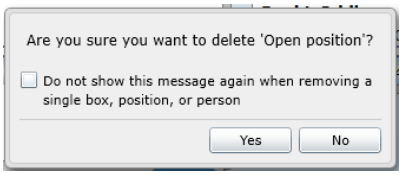

Are you sure you want to delete 'Open position'?
Do not show this message again when removing a single box, position, or person
Yes
No

Figure 287.

If you do not want to display the verification message every time you select an option, select the **Do not show** check box.

The open position is removed from the box.

Removing a Person and Leaving an Open Position

1. Select the box where you want to remove the person and hover the cursor over the lower right corner. Click **Action**.

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2. Click **Remove person and leave Open position** in the options list.

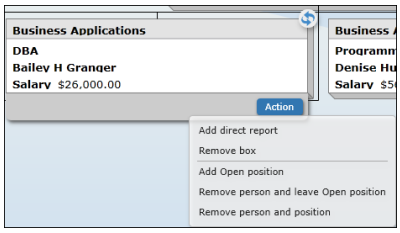


Figure 288.

A message displays asking you to verify this action. Click **Yes**.

The person is removed and an open position is left in the box.

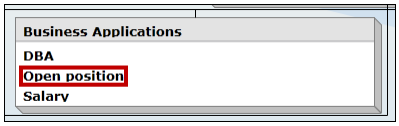


Figure 289.

Filling an Open Position with an Internal Transfer

1. Select the box where you want to fill the open position and hover the cursor over the lower right corner. Click **Action**.
2. Click **Fill position with internal transfer** in the options list.

   The Fill Position with Internal Transfer dialog opens.

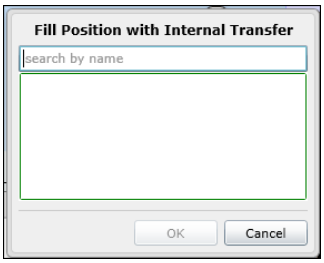


Figure 290.

3. Type some or all of the name you want to find. You can type either the first or last name or both.

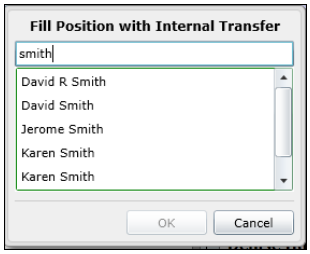


Figure 291.

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4. When you stop typing, a list of possible matches appears. Select the name you want. The dialog indicates that an open position will replace that person in his current box.



Figure 292.

Click **OK**.

The selected person replaces the open position, as shown on the left, and an open position now exists in the employee's original box, shown on the right.

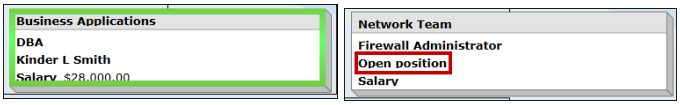


Figure 293.

Filling an Open Position with an External Hire

1. Select the box where you want to fill the open position and hover the cursor over the lower right corner. Click **Action**.
2. Click **Fill position with external hire** from the options list.

   The Fill Position with External Hire dialog opens.

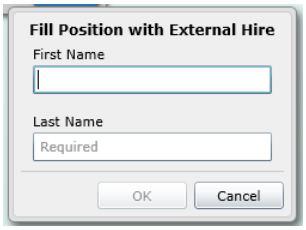


Figure 294.

3. Type the **First Name** and **Last Name** of the person filling the position. Click **OK**.
4. The box now contains the name just entered.

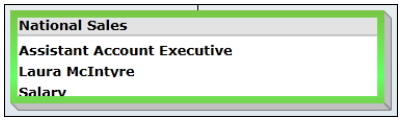


Figure 295.

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Removing a Person and Position

1. Select the box where you want to remove a person and position and hover the cursor over the lower right corner. Click **Action**.
2. Click **Remove person and position** from the options list.

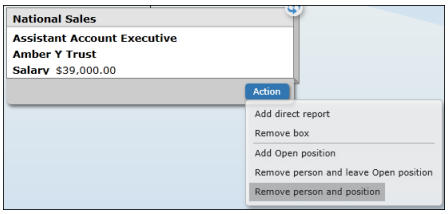


Figure 296.

3. A message appears asking you to verify this action. Click **Yes**.

   All information is removed from the box except the box title.



Figure 297.

Removing a Box

1. Select the box where you want to add the open position and hover the cursor over the lower right corner. Click **Action**.
2. Click **Remove box** in the options list.

   A message appears, asking you to verify that you want to delete the selected box.

   Click **Yes**.

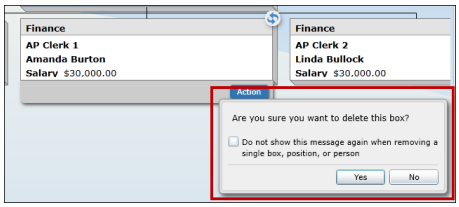


Figure 298.

The selected box no longer appears in the chart.

Undoing and Redoing Changes in the Planning Chart

When you make a change to a box, position, or person in the planning chart, you can have the option to reverse that change.

 - Click this button to reverse the last change to the plan.

 - Click this button to reinstate the change you just reversed.

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11.6 Searching the Cross Browser Chart

If enabled by your administrator, you can search fields in a published cross browser/Silverlight chart.

1. In the Search field 

in the toolbar, type the name or partial name of the field you want to find.

   The search results open in a List View dialog. The **List** view displays a maximum of 10 people with the rest accessible via additional pages.

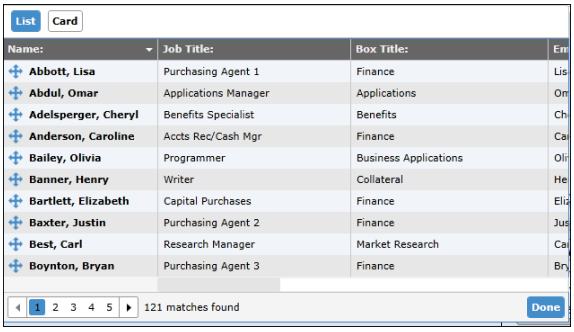


Figure 299.

2. Use the scroll bar or page browser to find the name you want and click on it. OrgPublisher moves to the box location in the chart and highlights your selection.

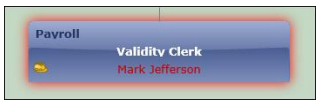


Figure 300.

   You can also view the search results in a Card view. The Card view displays a maximum of 5 people with the rest accessible via additional pages.

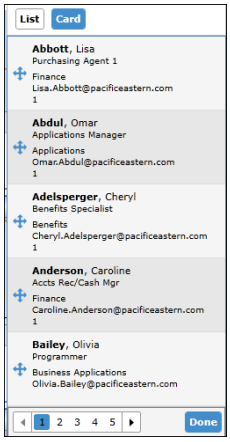


Figure 301.

3. Click **Done** to close the search results.

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Dragging and Dropping into an Open Position from Search

1. Select the drag button in the left-corner of the employee record and click.

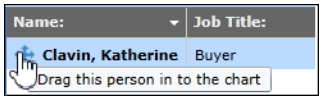


Figure 302.

2. As you begin dragging, the open positions appear with a green outline in the chart boxes. Hold the mouse button down and drag the record to the open position you want to fill.

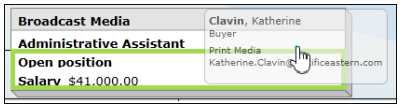


Figure 303.

3. Drop the record on the box.

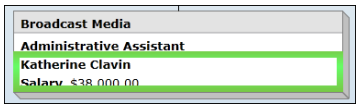


Figure 304.

The person now fills the open position. That person's associated data, such as salary displayed above, also moves with the person.

Configuring Cross Browser Search View

If enabled by your administrator, you can search fields in a published cross browser/Silverlight chart.

4. Click the Settings button in the toolbar Settings.

The Personalize Settings dialog opens.

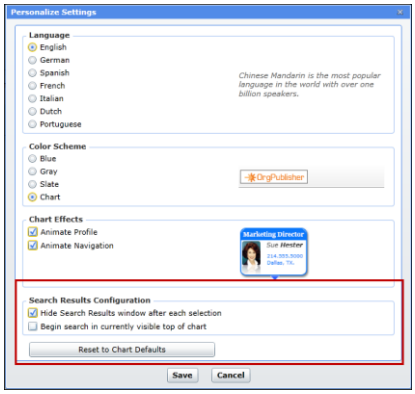


Figure 305.

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In the **Search Results Configuration** section two configuration options are available.

- **Hide Search Results window after each** selection - the default selection; hides the view once you have made a selection from the results list. You can clear the check box if you want the view to remain open. Unless you resize or move the view, this option may actually hide the chart box you want to view.
- **Begin search in currently visible top of chart** - this option limits the search area to the selected top of chart and levels below.

5. Make the selection you want and click **Save**. The chart displays your choices.
6. You can also click **Reset to Chart Defaults** to return to the published chart original settings.

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11.6 Viewing and Editing the Profile in Cross Browser Planning

1. Hover the cursor over the upper-right corner of a selected chart box. A Flip button  appears.
2. Click the button to open the Profile. Click the button again to close the Profile.

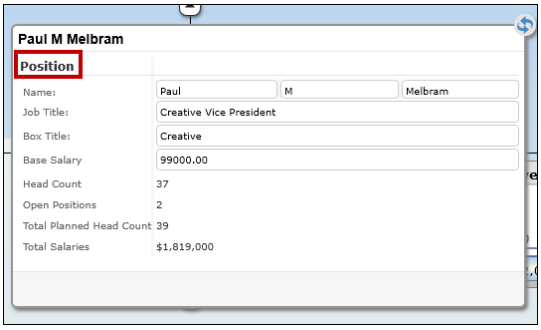


Figure 306.

Section titles in the Profile are displayed in bold font, such as **Position** in the above sample.

Editing a Profile Field

1. Select an editable field in the Profile. Editable fields display within an accessible field.



Figure 307.

When you place the cursor within an editable field with no formatting, such as a numeric field, the value displays just below the field, showing the associated format.

2. Type the new value in the Profile field. Once an editable field is modified, the Profile displays **Save** and **Cancel** buttons at the bottom-right of the dialog.
3. Click 

to accept your changes. The Planning chart refreshes to display the new value.

   Protected fields that cannot be modified display the value as though it is part of the background in the Profile.

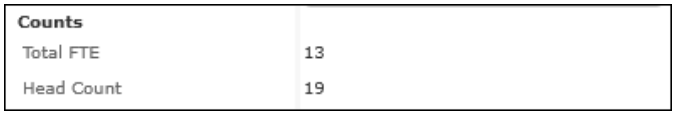


Figure 308.

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You can also select dates, such as Hire Date, using a calendar selector, as shown in the sample below.

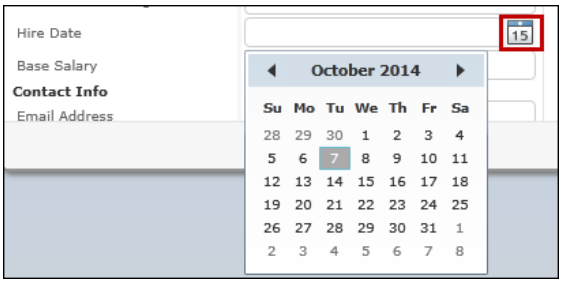


Figure 309.

Viewing Multiple Positions/People in the Profile

1. Hover the cursor over the upper-right corner of a selected chart box containing multiple positions/people. A Flip button appears.



Figure 310.

2. Click the button to open the Profile.

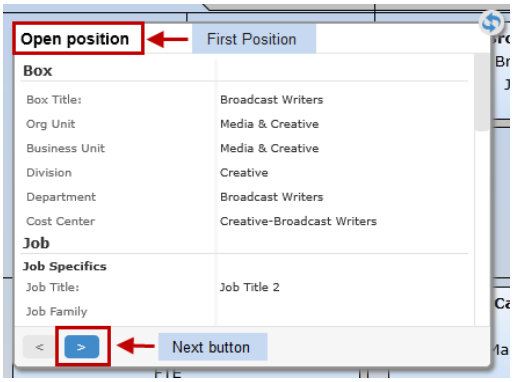


Figure 311.

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3. If applicable, edit the fields associated with this position/person. Click the Next button [>].

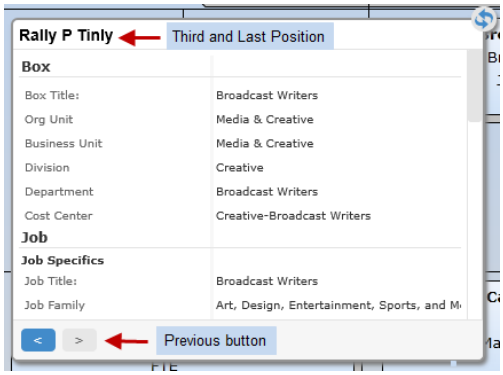


Figure 312.

Once the Next button is activated, a Previous button displays in the Profile as well.

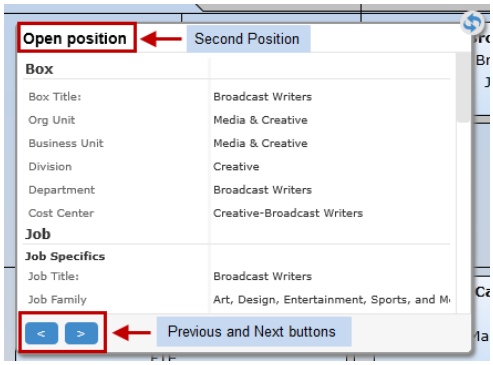


Figure 313.

If necessary, both the Next and Previous buttons are enabled.

4. Click the Previous button [<] to view the preceding positions. If you have changed any fields, click the Save button [Save] that appears in the dialog after a modification has been made.

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11.6 Using Drag and Drop in the Planning Chart

Using the Split View

When you open your planning chart, the display defaults to the split screen view. When you hover the cursor over the hint box, a description appears.

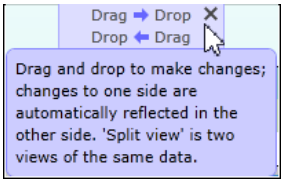

Drag Drop
Drop Drag
Drag and drop to make changes; changes to one side are automatically reflected in the other side. 'Split view' is two views of the same data.

Figure 314.

The split screen allows you to navigate easily through the chart levels using one view as your start location and the other view as your destination location.

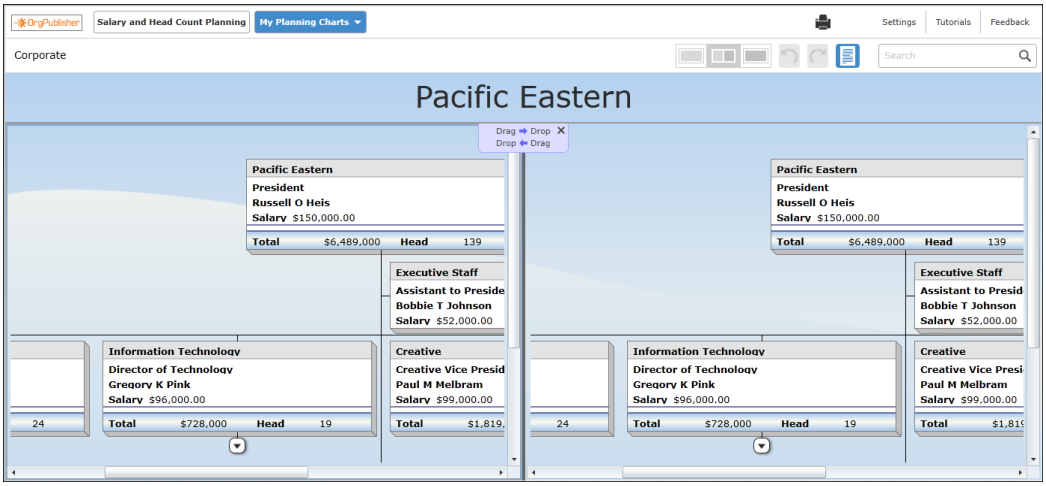


Figure 315.

If you do not want to work with the split view, select either the left or right view instead.

Dragging and Dropping a Box

1. Select the box you want to move.

   A purple glow appears around the box border.

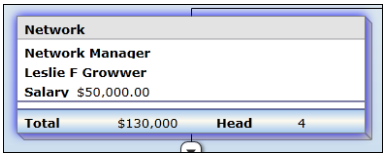


Figure 316.

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2. Begin dragging the box in the direction you want to go. The box turns a translucent purple, and green directional boxes appear wherever you are allowed to drop the box.

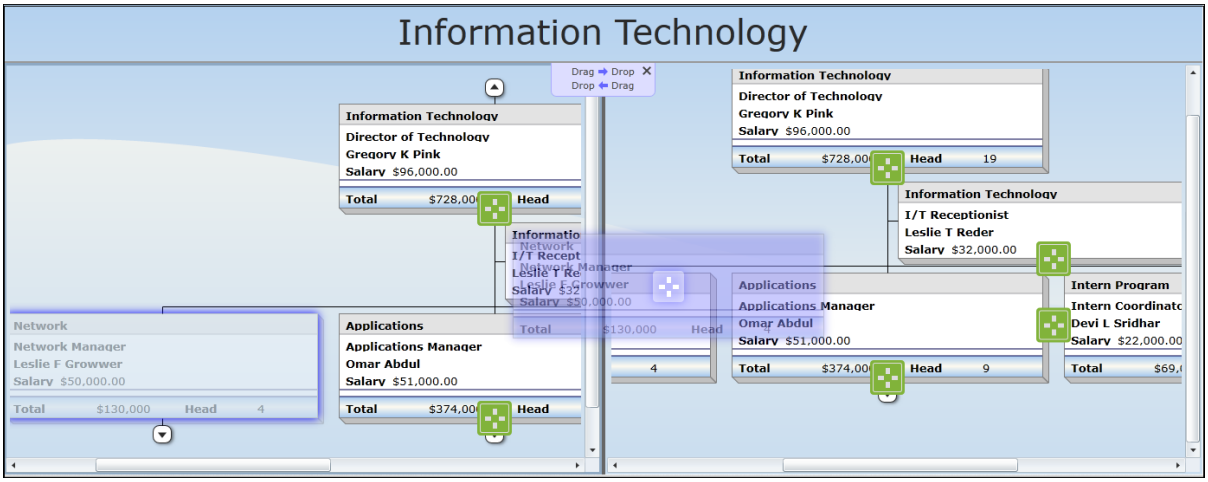


Figure 317.

3. When you hover over the destination box, the direction boxes disappear everywhere but the destination box.

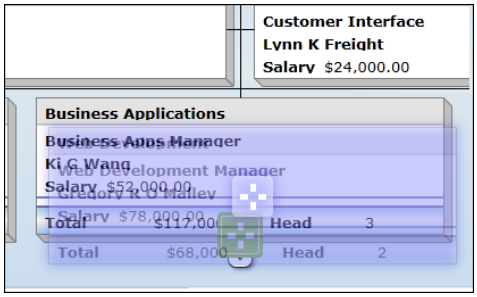


Figure 318.

4. Drop the box. The chart displays the dragged box in its new location.

   If applicable, you can click the Undo button  to revert to the previous hierarchy.

Dragging and Dropping a Person

You can drag a person only into an open position in the chart.

1. Select the person you want to move. The person's name and any fields related to the name appear with a purple glow as a border.

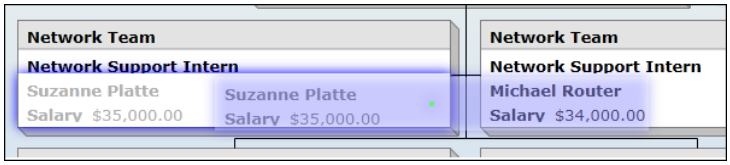


Figure 319.

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2. Begin dragging the person in the direction of the Open position box.

   The selection is now a translucent purple and a small green dot is visible inside the moving field.

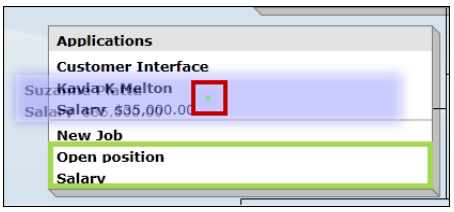


Figure 320.

   The fields allowed to accept the person drop are outlined in green.

3. Drop the name on the **Open position** field. The person's name replaces the "open position" text in the destination box, while in the original box, **Open position** has replaced the previous occupant's name.

Sending Feedback from Cross Browser Charts

If enabled by the chart administrator, you can send feedback about your experience with the cross browser/Silverlight chart.

1. Click the Feedback button [Feedback] to open your e-mail client.
2. If necessary, log in to your email client. The e-mail opens with the **To** and **Subject** fields filled in. Type your message then click Send.

Viewing Tutorials for Published Cross Browser Charts

You can view video tutorials and a PDF user guide on how to use a published cross browser/Silverlight chart.

1. Click the Tutorials button [Tutorials].

   The OrgPublisher Silverlight tutorials web page opens.

2. Select the tutorial or PDF you want to view.

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11.7 Enhanced What-if Planning Profile View Security

The ability to configure the Profile View in what-if org model or succession planning has been disabled. This prevents a planning chart administrator from inadvertently displaying fields in a planning chart that should remain hidden. Only the Copy right-click menu option is available.

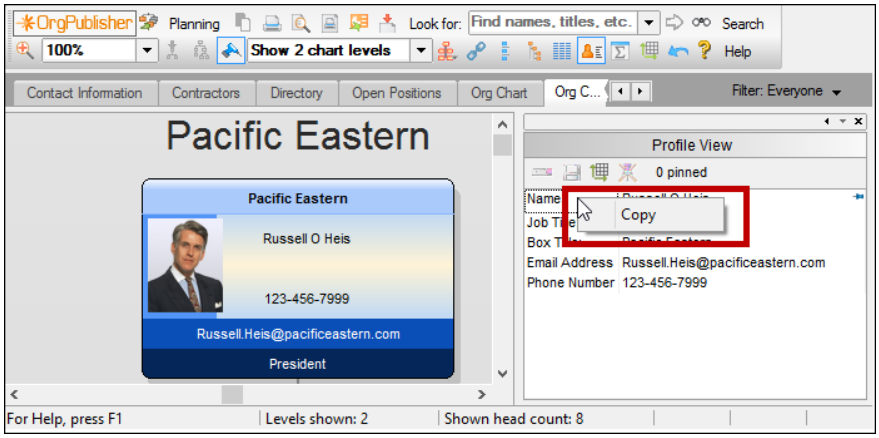


Figure 321.

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Web Administration

There are some things to remember when you work with Web Administration.

- The Web Administration Server chart design templates work if the web administration server (**remotserver.dll**) and the **OrgPub32.exe** installed on the server are both the current version. If one of these pieces has not been updated, OrgPublisher cannot pull the data it needs and a blank list of quick formats appears in the dialog.
- There is no option to **Set a Default Template** option when using Web Administration (thin client publishing format) because setting the template on the server sets the same default template for all chart administrators' charts.
- With the Web Administration server, all archived charts are automatically created in the server **ArchivedCharts** folder. In addition, if end users must access archived charts, they must be stored in the **SourceCharts** folder.
- Web Administration supports opening multiple data base charts (OCB, CSV) as long as those files exist in the **SourceCharts** folder. Web Administration, however, does not support creating multiple data source charts from these file types. Nor does it support editing the text file charts using the *Data sources* dialog.

Unless otherwise indicated, procedures throughout this document pertain to Web Administration.

Topics Pertaining to this Section	
Building a DSN Connection String	Scheduling a Publishing Task
Creating Alternate Destination Directories	Using a Virtual Directory
Entering a New License Key	Using the Select a Chart to Open Dialog
Publishing a Chart Using Web Administration	Web Administration Troubleshooting Tips

Building a DSN Connection String for Web Administration

The connection string is set up only once, and cannot be built from the client because that option is not available via Web Administration.

1. Verify that you are logged onto the Web/IIS Server with appropriate permissions.
2. Open **Administrative Tools** and select **Data Source (ODBC) Control Panel**.
3. Follow the dialog prompts to create the **DSN connection** to your Database Server or ODBC Data Source.
4. Save your entry and close the dialogs.
5. In OrgPublisher Web Administration, open the New Chart Wizard and follow the ODBC dialogs to create and ODBX file that you can use to build charts.

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Creating Alternate Destination Directories

When using OrgPublisher Web Administration Server, all charts default to the **PublishedCharts** folder. For security purposes, you may want to publish a chart to a different URL. In that case, you can use this procedure for securing DLLs by publishing some charts to different URLs. You can redirect the DLL by defining alternate destinations in the INI file.

1. Create an INI file with the name **RemoteServer.ini** on the web server.
2. Use the standard INI file format to add a section named [**PublishFolders**].
3. Add an item in this section to describe each publishing destination directory in the following format.

   http://DestinationUrl=c:\inetpub\wwwroot\MyFolder
4. When you publish your chart using the Publishing Wizard the dialog containing the field **Publish to location** will display a combo box. Select one of the alternate publishing URLs and complete the publishing process.

Entering a New License Key Using Web Administration

If you, as a server administrator for Web Administration, request a license upgrade or a trial extension of OrgPublisher, a new license key is provided by your sales associate.

1. When you receive the new key, a server administrator must log into the server and locate the installation folder. (If you use default paths, it is c:/program files/orgpub11.)
2. Run the OrgPub32.exe file in that root folder to open OrgPublisher and select Help in the Main menu.
3. Select License Information from the options list. The Licensing Information dialog opens, showing your license number and all features currently enabled, as well as your Position Count and expiration date, if applicable.
4. Click Enter new key. The License Key Entry dialog opens.
5. Copy the provided key from your e-mail message and click Paste Key. The license key displays in the Please enter a license field.
6. Type your company name in the Registered Company field. Click OK to accept the new key.
7. Reset IIS to activate the key in the registry by restating the remote administrator server.

   If an error message displays stating you have entered invalid information, click the Back button and verify that the license key and company name are correct and retry.

Note: Only the OrgPublisher administrator, logged into the server, can successfully enter a license key on the computer where OrgPublisher resides. The new license information is read when the remote administration server starts, after IIS is refreshed.

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Publishing a Chart Using Web Administration

You can publish charts in the OrgPublisher Web Administration Server just as you do in the desktop OrgPublisher. You can download the OrgPublisher Software Development Kit (OPSDK) for additional information about using the Web Administration server.

Note: You cannot change a publishing definition when using Web Administration. The publishing definition and name of charts published with Web Administration must be identical.

1. Open OrgPublisher in your browser. The Select a Chart to Open dialog opens. The columns in this dialog are defined below.
   - **Chart name** - The name given to the chart in Web Administration.
   - **Modified by** - The login name of the person who last modified the chart in Web Administration.
   - **Modification date** - The date and time the chart was last modified in Web Administration.
   - **Lock Status** - Indicates whether the chart is Locked or Not locked in Web Administration.
   - **Locked by** - The login name of the person who has locked the chart in Web Administration.
   - **Locked on** - The date and time the chart was locked in Web Administration.
2. Select a chart to open from the list or select New Chart. Click Open. The selected chart opens in the browser.

   If you try to open a locked chart, a box displays the message **The Chart is Locked by Another User**, and gives you an option to **Open Read-Only** or **Cancel** your request.
3. Click the Publish button in the toolbar. If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard.
4. Accept the default **Express Mode** if you want to publish a basic chart. Select **Advanced Mode** if you want to make detailed option selections. Click Next.
5. Accept the default **Interactive Org Chart** selection if you want to publish to PluginX or EChart. Select the **Org Chart Document** radio button if you want to publish a PDF, HTML, or Graphic. Click Next.
6. Follow the publishing procedure for the publishing format you want:
   - **EChart Rich Client Format** - make sure that you add "publishedcharts" to the URL Publish to location
   - **EChart Thin Client Format** - make sure that you add "publishedcharts" to the URL Publish to location
   - **Graphic Format**
   - **HTML Format**
   - **PDF Format**
   - **PluginX Format**

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7. If you publish an EChart to a server, the EChart Link Summary text box displays the published EChart link. Click on the link to open the published chart.

   You can also republish a chart in Web Administration.

   Note: Web servers do not allow clients to schedule tasks. The OrgPublisher Web Administration Server allows you to publish charts manually. You can, however, open the desktop OrgPublisher version and schedule the publishing definition in the Publish charts dialog using the Web Administration **SourceCharts** folder.

   - Log on the server as an administrator or power user.
   - Open the desktop OrgPublisher application. (If default install is used, it would be in **c:/program files/orgpubx**).
   - Open the chart (found in the **SourceCharts** folder).
   - Schedule the publishing definition in OrgPublisher using the Schedules tab.

   Also, when you are publishing to ECharts, you must manually schedule the BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

Scheduling a Publishing Task Using Web Administration

If you are publishing a chart through Web Administration, the **Schedule Now** option is not available in the Publishing Wizard. The following steps would be used in Web Administration.

1. Log onto the server as an administrator.
2. Open the desktop OrgPublisher application. (The default installation uses the in **c:/program files/orgpubx** folder.)
3. Open the chart (found in the **SourceCharts** folder).
4. Schedule the publishing definition in OrgPublisher using the **Schedules** tab per following instructions.

   When you are publishing to ECharts, you must manually schedule the .BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

Using a Virtual Directory

When you publish ECharts (desktop OrgPublisher or Web Administration), whether to a rich client or thin client, or when you publish a real-time chart, you publish to the physical directory but the reference to the chart (or web page) using HTTP must reference the virtual directory, if your web server uses one. If not, use HTTP://mychart.htm in the URL field in the Publishing Wizard.

Verify that the chart is published to a virtual directory with execute permissions. If you are not sure of the structure of your web server, please contact your Web administrator.

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Using the Select a Chart to Open dialog

You can choose to add or delete charts, open an existing chart, or modify a chart in Web Administration using the Select a Chart to Open dialog.

When you open OrgPublisher Web Administration in your browser, the Select a Chart to Open dialog appears. This dialog defaults to the detailed list of files. You can change that to view large icons or small icons.

Field	Description
Chart name	The name of the chart in Web Administration
Type	The file type of the chart, such as text file or database connection.
Modified by	The login name of the person who last modified the chart
Modification date	The date and time the chart was last modified
Lock Status	Indicates whether the chart id locked or Not locked
Locked by	The login name of the person who has locked the chart
Locked on	The date and time the chart was locked

- If you want to open a new chart, click **New Chart**. The New Chart Wizard opens. Follow the dialog prompts to create your chart.
- If you want to delete a chart, select the chart from the records list and click **Delete Chart.** A message verifies that you want to delete the record, as you cannot "undo" that action. Click **Yes** to delete or **No** to cancel the action.
- If you want to import an OrgPublisher chart from a disk drive, click **Import**. The Import OrgPublisher Chart dialog opens. Type or **Browse** to the location of the chart you want to add to OrgPublisher with Web Administration. Click **Import**.

Web Administration Troubleshooting Tips

In order to use OrgPublisher Web Administration, you must configure IIS, where you can experience connection and authentication errors. This topic provides tips on some of the most common problems seen. Contact the Support team can help you resolve these and other issues.

- If you get an Internet Explorer window with a grey bar at the top but no chart, set the MIME type of .OCP on the **publishedcharts** folder.
- If you receive the error, “Unable to contact the remote server.dll at this URL,” This indicates the paths to the virtual directory and URL were, likely, not entered correctly when installed, or the permissions are not set. This may require reinstalling the application, per the installation guide.
- Chart administrator or end users get a blank IE screen with a red X in the upper left corner indicates a problem installing and registering the ActiveX control. Installing ActiveX controls requires administrative rights on the PC. Your IT group can request MSI scripts to assist in pushing out the plugins. Please contact Support if you require a script.

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Understanding HTTP error messages and their associated status codes is important when you need to troubleshoot IIS. A few common errors on the client side (4xx error) and server side (5xx error) are listed below:

Error Code	Definition
400	**Bad request**; the server cannot service the request, usually because of an incorrect URL.
401	**Unauthorized**; the user's credentials were not accepted by the authorization process.
403	**Forbidden**; the request could not be serviced for a number of reasons even though the user was authenticated.
404	**Not found**; the server cannot locate the requested file.
405	**Method Not Allowed**; the client incorrectly issues an HTTP GET request when an HTTP POST request should have been issued.
406	**Not Acceptable**; the requested file is not supported by the client.
407	**Proxy Authentication required**; the client has to authenticate with the proxy server before its request can be serviced.
410	**Gone**; the server no longer has the requested file.
500	**Internal Server Error**; indicates a typical server side error.
501	**Not Implemented**; the server does not support the HTTP method requested by the client.
502	**Bad Gateway**; an invalid response was received by the upstream server for which this server is a gateway.
503	**Service Unavailable**; the server does not support the service requested by the client.

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Troubleshooting

The topics in this section provide information helpful in resolving issues that may occur.

Topics Pertaining in this Section	
Addressing Warning s and Error Messages	Resolving Reporting Relationship Problems
Automatic Publishing Tips	Troubleshooting Automatic Publishing
Identifying a Broken Hierarchy	Troubleshooting Tips for Published ECharts
Identifying Invalid Comma-separated File Format	Web Administration Troubleshooting Tips

Addressing Warnings and Error Messages

Message 1

Too few fields in record #, Abort file read?

The **Messages** option under the **Options** menu must be checked for this message to appear. The message is caused by having less than 10 fields in any record within the Input File. The number of the records in error is displayed in the message.

Message 2

records read. Do you wish to continue?

The **Messages** option under the **Options** menu must be checked for this message to appear. This message allows you to stop OrgPublisher reading the Input File at a certain record limit. The following setting determines the number of records read each time before this warning is displayed:

```
[Settings]
warn after=1000
```

This setting can only be changed by manually editing the OrgPublisher registry settings. *The default setting is to warn after every 200,000 records are read.*

Message 3

Warning!

Chart is too wide to be displayed correctly. Please alter the chart style and/or reduce the width and spacing of boxes.

This message occurs if the width of the chart to be displayed is *larger than 30,000 characters across.*

To resolve this problem, try changing the chart style by selecting **Format** from the menu bar, then **Chart** from the pull-down menu, and then choose a more compact chart layout in the Format dialog.

In addition, try reducing the character width of boxes and the horizontal spacing between boxes. Setting the overall chart font to a smaller font such as Arial 6 point, using the Font tab of the *Format* dialog will also reduce the chart width. Using the Drill-up/Drill-down features in OrgPublisher can also solve this problem because it limits the number of organizations levels displayed at any one time. As a last resort, break up your org chart into smaller, more manageable charts.

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Message 4

OLE 2.0 initialization failed. Make sure that the OLE libraries are the correct version.

This message is displayed when OrgPublisher is unable to locate a required **OLE2** file on your PC.

During the OrgPublisher setup process **OLE2** files are copied to the Windows System directory. Check that these files have been installed. Try rebooting your PC and then reinstalling OrgPublisher.

If your PC is connected to a network, ensure that you are able to write to the Windows System directory. If you do not have the necessary network access, request that your networking group install the product for you.

Message 5

Failed to allocate space for objectName.

OrgPublisher has run out of available memory. Close OrgPublisher and all other programs. Restart OrgPublisher and open the org chart again. Also, try restarting Windows before running OrgPublisher. If the situation persists, try adding more memory to your PC or reduce the size of your org chart.

Message 6

Warning! The maximum number of organization levels has been exceeded.

The org chart has exceeded 499 levels. This may be caused by an invalid reporting hierarchy.

Please e-mail Customer Support if you suspect your data is correct.

Automatic Publishing Tips

- Schedule the jobs to run when the fewest number of users may look at the chart, for example, the middle of the night. Verify that it is not at the same time that system backups are running, as those jobs can have files "locked" that are required to run the publishing job.
- If you schedule separate jobs, verify that you allocate enough time between the jobs so the first job is finished running OrgPublisher before the second one starts.
- It is best not to use file names longer than 8 characters. Some versions of the Microsoft Task Scheduler may not handle those file names consistently. If you do use file names with more than 8 characters, and you have other files in the same path with only 8 character names, the wrong file may be used for the job.
- Do not use special characters or spaces in file names.

Identifying a Broken Hierarchy

When you create your input file layout for your first chart and define your relationship hierarchy, OrgPublisher remembers that hierarchy.

OrgPublisher determines if any of the established relationships are broken when you open your chart built from data. For instance, if a manager should leave your company, and is deleted from your database, and if the records for the employees who reported to that

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manager are not changed to reflect a new reporting relationship, OrgPublisher generates an error report listing those broken hierarchies.

The following is an example of the error message:

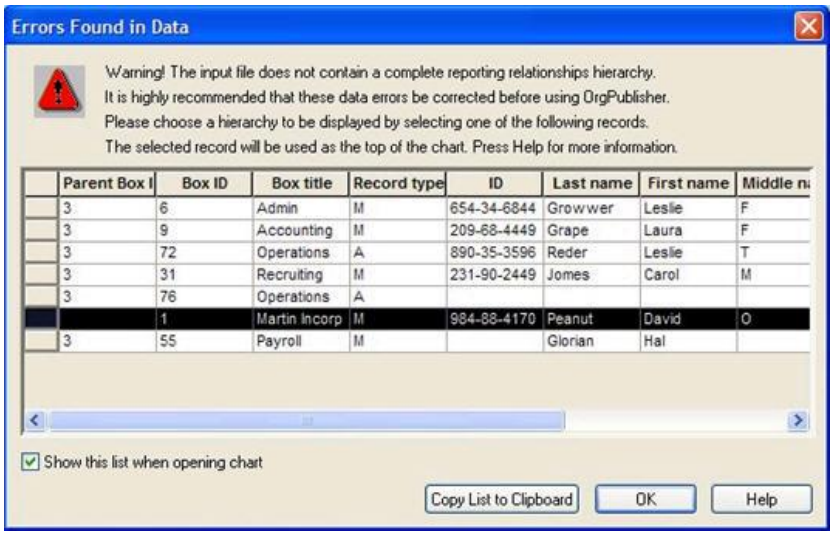

Errors Found in Data
Warning! The input file does not contain a complete reporting relationships hierarchy.
It is highly recommended that these data errors be corrected before using OrgPublisher.
Please choose a hierarchy to be displayed by selecting one of the following records.
The selected record will be used as the top of the chart. Press Help for more information.
Parent Box I
Box ID
Box title
Record type
ID
Last name
First name
Middle n
3 6 Admin M 654-34-6844 Growwer Leslie F
3 9 Accounting M 209-68-4449 Grape Laura F
3 72 Operations A 890-35-3596 Reder Leslie T
3 31 Recruiting M 231-90-2449 Jomes Carol M
3 76 Operations A
1 Martin Incorp M 984-88-4170 Peanut David O
3 55 Payroll M Glorian Hal
Show this list when opening chart
Copy List to Clipboard
OK
Help

Figure 322.

You can copy the list and use it to correct your HR database and then update your chart.

Identifying Invalid Comma-separated File Format

When building from data or using API function definitions, found in the OrgPublisher Software Development Kit (OPSDK):

- Ensure that fields that contain a comma, such as last name, are enclosed in quotes.

  Example:

  Incorrect: ,Smith, Jr.,

  Correct: ,"Smith, Jr.",

- Ensure that fields do not contain any quote characters.

  Example:

  Incorrect: ,"Mc"Donald",

  Correct: ,"Mc'Donald",

- Ensure that there are no blank records at the end of the file. Word processors and spreadsheets may inadvertently leave blank lines at the end of the file. The last record in the file should be followed by the end of file marker.
- Ensure that no single field is over 2000 characters in length.
- Ensure that there are no less than 10 comma-separated fields in each input record.

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Resolving Reporting Relationship Problems

If you open a chart that contains incomplete or invalid reporting relationships, the Errors Found in Data dialog opens when you open your chart. This dialog displays the incomplete hierarchy, or orphan records. The *Errors Found in Data* dialog finds information in the data for **Parent Box ID**, **Box ID**, **Box title**, **Record type**, **ID**, **Last name**, **First name**, and more for each error record.

> **Note:** The records listed from your input file, and any boxes reporting to these records, will not display in your org chart. Review the records listed to determine the problem.

1. If you want to quickly open the chart without resolving the relationship problems, you can select the "top of chart" record, for instance the CEO or president box, to display your chart with only the valid records. This represents an incomplete organization.
   - The only valid record in the *Errors Found in Data* dialog that can display a blank **Parent Box ID** field is the "top of chart" box, usually the CEO or President of the company, because that box does not report to another box.
   - Select a record of, for instance, a **Manager** to display all the boxes that report to that box. However, this closes the *Errors Found in Data* dialog and does not resolve the reporting relationship problem.
   - You may see records listed in this dialog that display a **Parent Box ID**. This suggests that the actual record for that box is not in your database, or the **Box ID** is invalid.
   - You may see records listed in the dialog that display a blank **Parent Box ID** field. This suggests that these records in your database are incomplete, with no parent box ID recorded.
2. To assist you in resolving errors in your source data, select the records in the list and click **Copy list to clipboard**.
3. Open a Windows application, such as Microsoft Word or Excel.
4. Press **Ctrl+V** or click the Paste  button in the toolbar to paste the records. Either save this document or print it so that you can research the invalid data and correct your HR database.
5. Close your chart and correct your database. Once your HR database is corrected, reopen your org chart. The missing records now display and the *Errors Found in Data* dialog does not open if all records have been corrected.

> **Note:** If the Messages option is cleared in OrgPublisher Options menu list, the Errors Found in Data dialog does not open even though you may have reporting relationship problems.
>
> Once you have corrected your data, you can turn off messages in order to increase your processing time.

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11.7 Sortable Columns in Errors Found in Data dialog

When building a chart from data, OrgPublisher notifies you when hierarchical errors exist.

The Errors Found in Data dialog provides a list of records with a brief description of the problem.

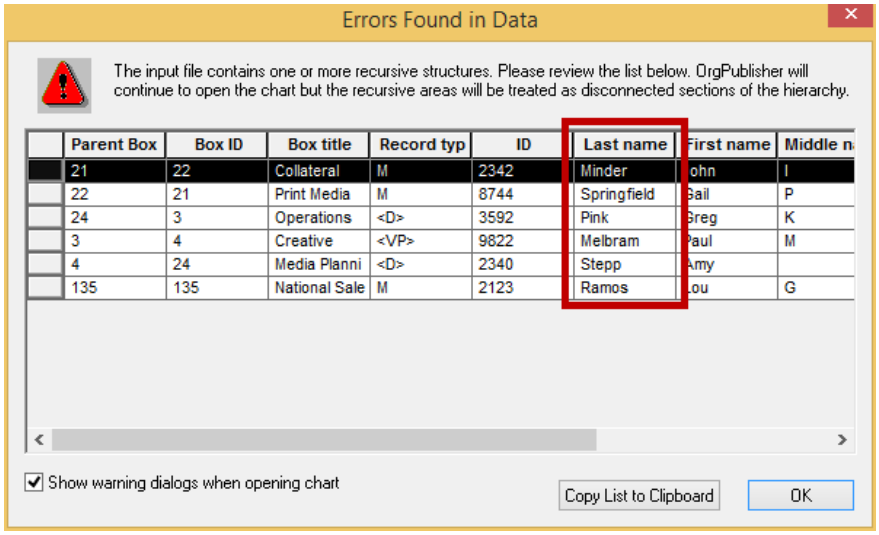

Errors Found in Data
The input file contains one or more recursive structures. Please review the list below. OrgPublisher will continue to open the chart but the recursive areas will be treated as disconnected sections of the hierarchy.
Parent Box | Box ID | Box title | Record typ | ID | Last name | First name | Middle n
21 | 22 | Collateral | M | 2342 | Minder | ohn | I
22 | 21 | Print Media | M | 8744 | Springfield | ail | P
24 | 3 | Operations | <D> | 3592 | Pink | reg | K
3 | 4 | Creative | <VP> | 9822 | Melbram | aul | M
4 | 24 | Media Planni | <D> | 2340 | Stepp | my
135 | 135 | National Sale | M | 2123 | Ramos | ou | G
Show warning dialogs when opening chart
Copy List to Clipboard
OK

Figure 323.

You can now sort the columns in the dialog in ascending or descending order for easier resolution of the problem.

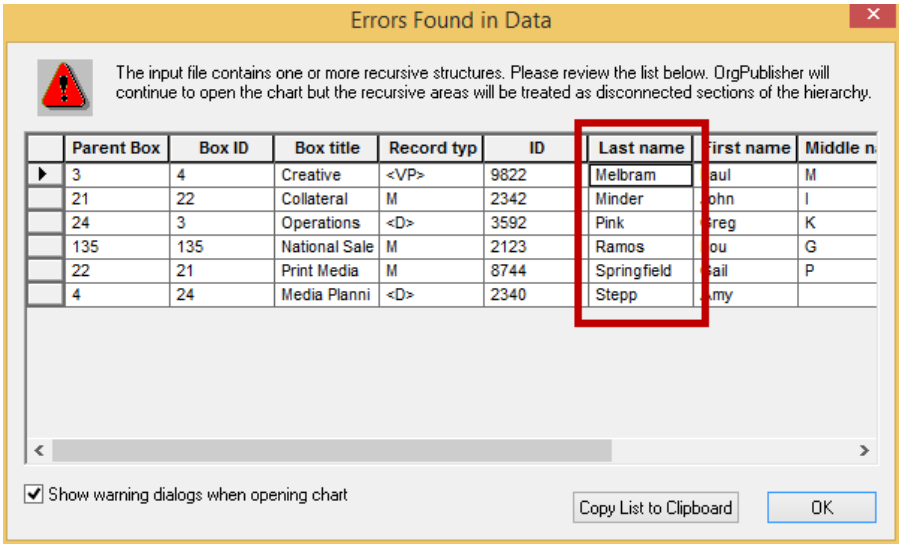

Errors Found in Data
The input file contains one or more recursive structures. Please review the list below. OrgPublisher will continue to open the chart but the recursive areas will be treated as disconnected sections of the hierarchy.
Parent Box | Box ID | Box title | Record typ | ID | Last name | First name | Middle n
3 | 4 | Creative | <VP> | 9822 | Melbram | aul | M
21 | 22 | Collateral | M | 2342 | Minder | ohn | I
24 | 3 | Operations | <D> | 3592 | Pink | reg | K
135 | 135 | National Sale | M | 2123 | Ramos | ou | G
22 | 21 | Print Media | M | 8744 | Springfield | ail | P
4 | 24 | Media Planni | <D> | 2340 | Stepp | my
Show warning dialogs when opening chart
Copy List to Clipboard
OK

Figure 324.

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Troubleshooting Automatic Publishing

If you are experiencing problems with automatic publishing using the Publish charts dialog, check to ensure that:

- You have local Administrator group privileges on Windows® XP, Windows® 2003 web server, or Windows® 2008 web server. These privileges are required in order to set up or run a job automatically.
- Microsoft Task Scheduler is installed. This is a Microsoft program, usually installed as a component of Microsoft Internet Explorer.
- you are not using letter-mapped drives for automatic publishing (e.g., **G:\NetworkPath\FileName**). In some cases they are not recognized when running jobs off-line. Instead, use UNC to specify network paths (e.g., **\\ServerName\Path\Filename**).

Error messages can be generated in two different log files:

- Look for the log in the **c:\program files\OrgPub(x)\OPAutoPub.log**. (The (X) is the version number of your OrgPublisher installation, for example, OrgPub9.) Find the date and time the job was supposed to run, and check for any error messages.
- Check the message log for the Microsoft Task Scheduler by clicking **Advanced** then **View Log**. Look for errors, such as "file not found" or "password not valid," based on date and time the job should have run.

Diagnosing Common Problems

Did the job ever run before?

Yes, the job has run before.

To isolate the problem:

1. Determine whether or not the job ever kicked off (look at Task Scheduler and the job itself) by checking the **Last Run Time** column.
2. Look in the published chart output folder to determine if the output chart files were actually updated. In the case of a PluginX chart, verify the time and date stamp on the **OCP** file. For EChart Rich or Thin client charts, verify the time and date stamp on the **OCS** file. If the EChart **OCS** file shows the correct time and date stamp, it may mean the server memory did not unload and load as specified in the **BAT** file. This may require a restart of the **Default Web Site**.
3. The log files should indicate if a file was not found or a "**Pub_Def**" was not found. The logs may also show a permission problem.

Any of the problems listed above may be as a result of one of the following:

- OrgPublisher cannot open on a machine at the same time a job is scheduled to run on it.
- If the scheduled task fails, check if any **OrgPub32** processes are running. Hold down the **Alt + Ctrl + Delete** keys simultaneously. Then click **Task Manager**. Under the **Process** tab, check if **OrgPub32** is active. If it is, select it and click **End Task**. The scheduled job will not start if you have one of these processes already running.

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Occasionally, when a job fails, it can leave one process running, depending on which part of the job fails.

- If you schedule a job and occasionally it does not run, but has run previously, try stopping the Task Scheduler service and restarting it.

Note: We recommend only one version of OrgPublisher be installed on a PC. When there are multiple versions, and you open from a scheduled task, the last used version is opened. This can cause unexpected results. (This can also cause problems with synchronization of PluginX versions.)

No, the job has never run automatically.

- Does the chart run manually (using the OrgPublisher application), but not from the Task Scheduler?

When running the Task Scheduler, you actually run under different privileges than when you work on the PC or server normally. The following permissions are required:

- To **Set Up a Scheduled Job to Run**, you must have Administrator privileges on Microsoft Windows 2000 or Windows XP.
- The user ID you are using to run the job must be in the Administrative Group of the LOCAL COMPUTER.
- In Windows 2000 or Windows XP, verify the User is in the **Administrative Group**, click **Start/Control Panel/Administrative Tools/Computer Management/Local Users/Group/Administrators**.
- If your job is on an IIS Server, the DCOM Default Access permissions must be configured using the program **DCOMCNFG.EXE**. Click **Start/Run** and type DCOMCNFG.EXE to execute the program. Choose the **Default Security** tab, and edit the default settings for the **Default Access** permissions. Add the **Local Administrators** group to the list of access permissions.

Other considerations that may affect automatic publishing:

- How was the chart published? If you published with EChart Rich or Thin client options, you must run the **BAT** file created in the first, manual publishing of the chart. For all other publishing options, you can use the *Scheduling* dialog from the Publishing Wizard to set up the job.
- Use UNC paths, not letter mapped drives because **Scheduled Jobs** run under a different type of user that does not use the same profile. Letter mapped drives are not available when running off line, and you receive errors such as "File not found" or ”r;Pub_Def not found.” A UNC path looks something like **//servername/share/folder/filename**.
- If you are using a regular workstation to automate the publishing rather than a server, you can log on two different ways, to the local machine or to the domain. (Typically, these jobs are run on a server rather than a workstation because the PC must be powered on – even though you are logged off.) For example, you can be USERIDA or you could be DOMAIN/USERIDA. (See your logon window when you log on to the PC.)
- You may see the following error message if Task Scheduler is not installed, "OrgPublisher AutoPub requires the installation of Task Scheduler. Contact your system administrator." Some older operating systems may not install Task

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Scheduler. You can verify this by selecting **Start/Find** and typing **Mstask.exe** to look for this application on your C: drive. If it is not there, Task Scheduler is not installed. This may also be the problem if you do not see the *Schedule* dialog in the Publishing Wizard.

Check the scheduled jobs:

- Check jobs under Task Scheduler by using Windows Explorer. Go to **My Computer**. Under this list you should see Scheduled Tasks. (In Windows 2000, this appears under **My Computer/Control Panel**.) Click **Scheduled Tasks**, and verify that your job is there. Click on the job name, and determine if there are any problems with any of the settings.
- Right-click on the job name and click **Properties**. Verify the **UserID** and **Password**, or change them.
- Right-click on the job, and click **Run** to run the job while it runs under the Task Scheduler. It may help to put the **AS OF** date and time in the title of the chart for testing purposes. Verify that this worked by navigating to the output file and checking the date and time stamp of the **OCP** file (PluginX) or the **OCS** (EChart Rich or Thin client).
- If an error message in one of the log files indicates that a file or **Pub_Def** was not found, this may indicate that the job cannot find the source file (**ODB** or **OCB**) that contains the publishing definition. Open the Task Scheduler (Version 7 and later), and right-click on **Properties** for the job name. You should see **Run As**.

  – The pointer to open the OrgPublisher application is located within the first set of quotes, and it should point to your installation.
  – The second set of quotes contains the path to your source file that gets opened to publish from. That file contains the publishing definition. Then you should see **/Pub_PublishingDefName**.
  – Letter mapped drives in the source file path can be a problem. "Tildes" are sometimes put in long file names and, in cases where you have other files in the same path with the same first 8 characters, there may be problems pointing to the correct file. Either change the job name to a shorter name, or replace the name in the **Run As** command with the full long name removing tilde (~) characters.
- If your OrgPublisher version is earlier than version 7, you must check the registry settings for the parameters of the **Run As** job. The Support team is glad to assist you with checking registry settings if you are unfamiliar with the process.
- Click on **Start/Run** then type **Regedit**. Click **HKEY_LOCAL_MACHINE/Software/Timevision/OrgPublisher/Schedule**. Your jobs should be listed. Determine if there are any problems with values in the job. There is a ”r;Text file ” value that should be the source file name (the file that gets opened to publish the chart from). The Destination is the output file path and name. You can modify either of these in the registry to spell out the full long file name if tilde (~) characters are used, or you can modify the path.

Note: If you contact Support, please send the following information:
- Error Log Messages
- Operating System and OrgPublisher Versions
- The publishing method for the chart, such as, EChart Rich, EChart Thin, PluginX, etc.

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Did you select the FTP option? If you experience problems such as:

- the **Schedule Status** tab's **Status** field reads **Never Published** or it is blank, or
- if Microsoft Task Scheduler indicates that the publishing job ran, but your chart is not published or updated you can use the Troubleshooting Automatic Publishing procedure.

Troubleshooting Automatic Publishing procedure

1. In the *Publish charts* dialog, in the **Schedule Status** tab, click **View log**. The **OrgPub32.LOG** opens in Microsoft Notepad. You can use this as a diagnostic tool by reviewing the schedule information.
2. If you see the **Never published** message after you have scheduled a chart to publish, you are probably still working in that org chart in OrgPublisher. Update your schedule to a new publishing time and close the chart.
3. If Task Scheduler indicates that your publishing job ran but your chart is not published or updated, or you can publish charts while you are logged on but they do not publish while you are logged off, there may be a conflict with Microsoft IIS. Open the Task Manager and click the **Processes** tab. If **OrgPub32.exe** is still running, this may be an indication that an IIS conflict exists.

If you installed OrgPublisher on an IIS server to automatically update charts, you may need to alter your default Distributed COM (DCOM) settings to allow authentication from any user in the local Administrators group. Note that changes to the default security settings can alter other permissions.

IIS alters the default DCOM security access settings, adding its own set of permissions that allow external access by users to Internet pages, thus changing the default security template and excluding permissions previously set up. An administrator must add the local Administrators group to the default security access list in the **DCOMCNFG.EXE** utility.

To add the local Administrator group to DCOMCNFG.EXE

1. Execute **DCOMCNFG.EXE**, usually found in the Windows system directory.
2. Select the **Security** tab.
3. Click **Edit Default** for the *Default Access Permissions* dialog.
4. Click **Add**.
5. **Browse** the local computer and select the local **Administrators group**.
6. Click **Add**.
7. Click **OK**.

When next you schedule a chart to publish while you are logged out, it should publish successfully.

If you are using FTP, you must have authority to write to the target server directory. The FTP server authority must be set to recursive to allow you to put the file in a directory you create. Otherwise, it will place your files in the server's root directory.

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Troubleshooting Tips for Published ECharts

If you are experiencing problems with published ECharts, these tips may answer your questions.

Thin client charts with photos published via Web Administration

Check with your system administrator to discuss the following.

- Photos will not display on a secure URL (https).
- The network requires photos be handled by the **LocalSystem** account. The IUSR does not have access to the **LocalSystem Temporary Internet Files** to read cached photos. This can be changed by granting the IUSR read access to the Temporary Internet Files.
- The **LocalSystem** home directory is **C:\Documents and Settings\LocalSystem**. The administrator can right-click on this folder and select **Properties** and **Grant IUSR_MACHINENAME Read access only** to the directory.
- In addition, the virtual directory must be set to run applications in the IIS process. The virtual directory property **Application Protection** should be set to **Low**.
- Windows XP, under **Tools>Options>View**, the administrator can select Show hidden files and folders.
- Changing the IIS user to be a privileged user is not recommended.

Refresh or display troubleshooting

- If your EChart does not open, you may get the error message **Unable to contact the EChart server at ...,** verify that the virtual directory where the EChart files reside has execute permissions.
- If you generated the chart by a scheduled batch file, verify that you are not using letter-mapped drives. For example, use **\\MyServer\path\filename**.
- Check your output file name in the publishing definition and remove any spaces or special characters in the output file name and any spaces in the definition name.
- Run the three separate batch file commands individually on the command line and verify the results. The data should be unloading and reloading each time you publish.
- Look for generated errors in **Task Scheduler>Advanced>View Log**.
- Check the **c:\Program Files\OrgPubX** directory for the **ORGPUB32.log** to review any errors that may have been generated at publishing.
- Verify that the chart administrator has authority to write to all folders in the tree/path to the directory if you can't find a log. Go to Windows Explorer and right-click on the appropriate folder. Select **Properties** then the **Security** tab. Select the name to view the permissions.
- Verify the time and date stamp on the output file coincide with the time you published the chart.

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- Stop and restart Microsoft IIS through the **Control Panel>Administrative Tools>Services>World Wide Web Publishing Service**. Right-click on **Restart**.
- Verify that there are no **ORGPUB32** hung instances by looking in the Task Manager. There must be no **OrgPub32** processes running before the next one can start.
- Reboot your server.

Print troubleshooting

If you want to override the print default of 5,000 records, you can manually adjust the registry setting in the client's machine registry.

- Select **Start>Run>regedit** and locate **HKEY_LOCAL_MACHINE>SOFTWARE>Aquire>OrgPublisherX>Publish**. Change the **EChartPrintLimit** record to the number you want to print. This becomes the new default print limit for ECharts.
- We recommend printing from within the OrgPublisher application on a PC with the capacity to handle very large charts. Printing enormous ECharts from the browser downloads all of the "person" data to the client machine. The network will experience a great deal of traffic and use much, if not all, of the RAM on the client machine.

If the above tips do not resolve your issue, please contact Support.

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Resources

OrgPublisher provides a variety of resources to support your OrgPublisher experience.

Topics Pertaining to this Section	
Customer Care Center	View Video Tutorials for Cross Browser Charts
View Quick Start Videos	Tip of the Day

Customer Care Center

Click **Support** in the main menu and select Customer Care Center. From this page, you can access support documents, how-to guides, and automation tools, and sample code if you need to customize OrgPublisher.

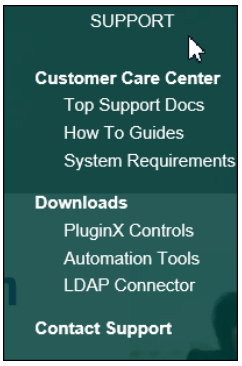


Figure 325.

You can also find system requirements and published versions of the OrgPublisher sample charts that include a directory and planning chart. These charts are web-enabled so you can navigate, search, change views, print, and more.

View OrgPublisher Quick Start Videos

In addition to the application help file, accessed through the Help menu option, you can also access the OrgPublisher Quick Start Video web page.

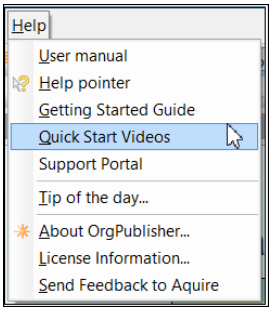


Figure 326.

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View Video Tutorials for Published Cross Browser Charts

You can view video tutorials on how to use a published cross browser/Silverlight chart.

1. Click the Tutorials button . The button may be visible on the toolbar; if not, click More and select the View Tutorials option from the drop list.

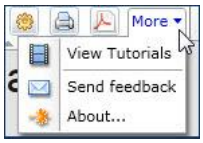


Figure 327.

   The OrgPublisher cross browser tutorials web page opens.

2. Select the tutorial you want to see.

Tip of the Day

OrgPublisher includes a tip of the day to help you with tasks you often perform and to provide you with additional information about the OrgPublisher program.

- Tip of the Day can display whenever you start OrgPublisher by selecting **Help** from the menu bar, then **Tip of the Day** from the pull-down menu. The *Tip of the Day* dialog opens. Select the **Show Tips at Startup** check box. Clear the check box if you do not want to automatically display tips.
- Or you can select the **Show Tips** check box at startup and click **OK**.
- You can scroll through the tips by clicking **Next Tip** or **Previous Tip**. Click **OK** when you have reviewed all the tips you want to see.

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